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NPTA MANAGEMENT NEWS

JUNE 1985

MN

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NATIONALREGIONALITY

There is a new printing paper distribution group in the industry, one with **national-regionality**—the service orientation and responsiveness of a regional distributor backed by the resources and continuity of a national organization. It's new, and it's one hundred-and-fourteen years old. It's the Printing Paper Unit of the Zellerbach Paper Group, and it's steeped in the tradition of good service, integrity and value that is the Zellerbach name.

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Zellerbach
PAPER GROUP

PRINTING PAPER UNIT

Zellerbach Paper Company
Virginia Paper Company
Southern Paper Company

MN

NPTA MANAGEMENT NEWS

VOL. XXVI/NO. 6

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WWF EXPANDS IN THE SOUTH

WWF Paper Corporation will expand its Southeast Region with the creation of WWF-South. WWF-South, headed by Douglas W. Ivester, has been designed to unify and strengthen its marketing and distribution efforts in this region. In addition to WWF's current branches in Atlanta, Richmond, Greensboro and Charlotte, Ivester will now be responsible for The Paper House in Miami and WWF-Orlando/Tampa.

"The goal of this reorganization is to better utilize our two sheeting facilities, our pool truck systems and our key marketing programs to serve our current and prospective customers," said James. D. Duncan, executive vice president of WWF in Bala Cynwyd, PA.

CENTURY FINALIZES PURCHASE OF CARDINAL PAPER

Century Papers, Inc. has closed the previously announced purchase of 100% of the common stock of Cardinal Paper Company of Oklahoma City.

All of the Cardinal management, headed by Robert White, chairman of the board, and James Jackson, president, will continue with their prior duties and responsibilities.

Cardinal branches in San Antonio, TX, Jackson MI, and Albuquerque, NM, will continue to operate as in the past under the direction of Cardinal Oklahoma City management. Artex-Lane in Dallas, TX, a wholly owned subsidiary, will be merged into the existing Century Dallas Division.

Century Papers reported sales of $76 million for the fiscal year ended March 31, 1984 and Cardinal reported sales of $24 million for the fiscal year ended May 28, 1984.

Century Papers, Inc., a distributor of paper and allied sanitary maintenance products, has been operating 12 distribution centers and five retail stores in Texas, Arizona and Colorado, as well as the limited partnership, Paper Products Company Group, in Tennessee and Mississippi.

WILLMANN PAPER REASSIGNS EXECUTIVES

Willmann Paper Company marked its 107th anniversary of its founding recently with the announcement of six new appointments among its top executives. Willmann Paper is one of the oldest paper merchant firms serving the greater New York metropolitan area.

Irving Kapner, president and chief executive officer, has become chairman of the board in addition to remaining CEO. Succeeding Kapner as president is Robert Caliguire, formerly executive vice president and chief operating officer. He will continue as COO.

Rhoda Dubofsky has been promoted to executive vice president/general manager and assistant secretary. She was previously vice president/general manager. Alfred Kruger, former vice president and treasurer has been named senior vice president as well as continuing as treasurer.

Martin A. Frankel, vice president, has also become secretary and Jeffrey Friedberg has been promoted to vice president-director of purchasing. He was previously purchasing agent.

"Our new executive assignments reflect the continued prosperity and growth of our long-established paper merchant firm," Mr. Kapner said in regard to the reassignments. He also noted that the company's anniversary was "an unusual achievement for any business concern."

PAPER BAGS JOIN THE SEARCH FOR MISSING CHILDREN

Another campaign has begun to aid in the nationwide search for missing children—The Abducted Child Information and Safety Tips Bag Program. This is the use of paper grocery bags to print pertinent information about missing children and to offer safety tips to prevent abduction.

This new campaign has been launched by the International Paper Company and the National Child Safety Council (NCSC) and is the latest cooperative effort between the two organizations. They began a similar campaign earlier in the year using the side panels of ½ gallon milk cartons.

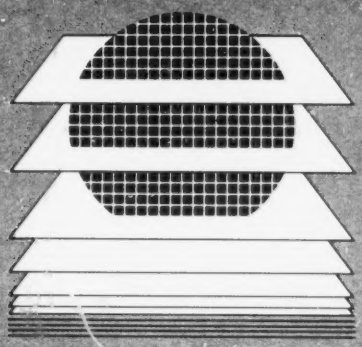
PAPER DISTRIBUTORS SEE INCREASE IN PAST DUE ACCOUNTS

In the closing quarter of 1984, paper distributors saw a significant decrease in the percentage of current accounts and an increase in past-due accounts, reported the Information Services Division of TRW, Inc. Compared to the same period a year before, current accounts have dropped by 4.2%. TRW prepared the following chart of the total percentages of accounts receivable for paper distributors.

Paper Distributors		1983 1Q	1983 2Q	1983 3Q	1983 4Q	1984 1Q	1984 2Q	1984 3Q	1984 4Q
	Current	38.6	47.2	37.1	69.6	40.5	67.4	73.5	65.4
Past Due	1-30	41.1	35.8	42.1	18.8	39.1	20.1	16.0	19.7
Past Due	31-60	11.1	9.5	11.1	5.9	11.7	7.0	5.9	8.0
Past Due	61-90	4.4	3.5	4.7	2.2	5.6	2.0	1.9	2.3
Past Due	91 +	4.9	4.1	5.1	3.5	3.1	3.5	2.7	4.6

NATIONAL PAPER TRADE ASSOCIATION, INC.

PREPARING FOR THE FUTURE



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The Annual Convention

AND PAPER/PLASTICS AND ALLIED PRODUCTS

Exposition

October 5-8, 1985
New York Hilton-Sheraton Centre Hotels

Paper distributors from every state in the Union and 16 foreign countries will meet in New York for the major event of the year: NPTA's Annual Convention and Paper/Plastics and Allied Products Exposition.

Plan on being there for important workshops and seminars, a chance to meet the leaders of the industry, share ideas, and learn what's new on the market for paper distributors.

Expo '85 will feature paper, plastic and related products including health care disposables, retail and industrial packaging, food service items, sanitary supplies and equipment, non-wovens, foils, tapes, wraps and other specialties. Computer hardware and software designed specifically for paper distributors will also be displayed.

Don't miss NPTA's Convention and Expo '85—The Show, the Meetings, the Special Events. . .all waiting for you in New York!

Exposition Management:
Scherago Associates, Inc.
515 Broadway
New York, New York 10036
(212) 730-1050

Sponsoring Organization:
National Paper Trade Association, Inc.
111 Great Neck Road
Great Neck, New York 11021
(516) 829-3070

"We sincerely hope that the paper bag program will be effective in helping to identify and locate children who have been criminally abducted," said John A. Georges, president and chief executive officer of IP. More than 1.8 million children are reported missing every year. "Not all missing children are runaways, some just seem to vanish," noted Howard R. Wilkinson, president and founder of the NCSC.

The paper bags will contain a photograph of a missing child and important information on one side including a toll-free number to report sightings and additional information. Printed on the other side of the bag will be a list of safety tips advising children and parents how to avoid child abduction.

PENTAIR SELLS HURON DIVISION

Pentair, Inc. has recently announced the completion of the sale of its Huron Office Products subsidiary to Ampad Corporation of Holyoke, MA.

"Ampad purchased the entire Huron Office Products business with operations at Litchfield, KY and San Bernadino, CA," said D. Eugene Nugent, Pentair president and CEO.

Pentair, Inc., with 1984 sales of $545 million, now has six subsidiaries and nine manufacturing facilities producing paper, electric tools and machinery in the U.S., Brazil and Canada.

GP SELLS TIMBERLAND TO WEYERHAEUSER

Georgia-Pacific recently announced the sale of 134,000 acres of Douglas Fir timberland near Springfield, OR to Weyerhaeuser. Under the agreement of the sale, Weyerhaeuser has purchased 74,000 at approximately $350 dollars per acre and they will acquire the remainder of the timberland over the next three years.

"This sale is part of our on-going strategy to redeploy assets closer to stronger markets and the bulk of our manufacturing operations," said T. Marshall Hahn, Jr., chairman of the board and CEO of Georgia-Pacific. "The building product markets, particularly in the Northwest, have been adversely affected by the strong dollar, increased Canadian imports and escalating labor, freight and other costs," he added.

A ground breaking ceremony was held on April 11 for a 16,000 square foot addition of the manufacturing space to the Monadnock Paper Mills, Inc. plant in Bennington, New Hampshire. Present (l. to r.) were: Abdellatif Najib, Union Local #472 President; George Edwards, Ass't. Plant Engineer; Fred Baybutt, Project Manager; Roy Hackler, Vice-President of Baybutt Construction Corporation, the Designer/Construction Manager for the expansion; Richard Verney, Chief Executive Officer of Monadnock Paper Mills, Inc.; Dr. Louis Busche, President of Monadnock Paper Mills, Inc.; John Baybutt, Construction Supervisor; Christopher Kordes, Union Vice-President. Monadnock Paper Mills, Inc. is a specialty mill producing a unique combination of premium Text and Cover printing papers and highly specialized Technical papers.

HAMMERMILL TO PURCHASE NICOLET

Hammermill Paper Company announced that it has reached an agreement in principle with Philip Morris Incorporated to purchase, for cash, Nicolet Paper Company of DePere, WI. The final purchase is subject to approval by the Hammermill and Philip Morris Boards of Directors.

Hammermill President Donald S. Leslie, Jr., said "Nicolet's products will be a valuable addition to the current diverse products of Hammermill's Industrial and Packaging Papers business group."

COMET ANNOUNCES CHANGE IN OFFICERS AND FORMATION OF NEW SUBSIDIARY

Comet Products Inc., Chelmsford, MA, the world's largest manufacturer of injection-molded food and beverage service disposables, recently announced reorganization and officer changes. The new president of Comet is Dominic J. DiSalvo and the executive vice-president is Gary Seligson. New officers are vice-president of Foodservice Sales - A. David Eklund, and vice-president of Finance - Stephen Morehouse. Former president Joseph P. Solomon is remaining with the company as a consultant.

Comet Products Inc., also announced the formation of a subsidiary company, Distribution Concepts Unlimited. Vice-president of DCU, David Gordon, says the company will provide consulting and brokerage services to the transportation and distribution industries.

BERWICK 1985
America's largest producer
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has now added . . .
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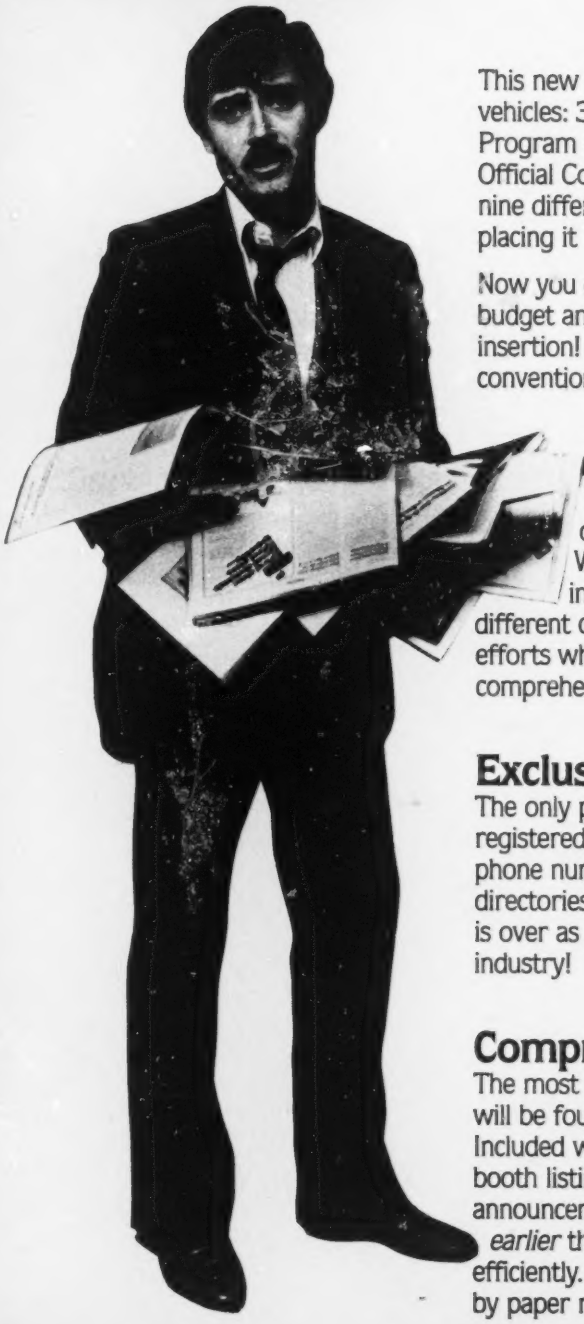
Every once in a while an idea comes along that makes History...

Announcing
MN (Management News) Magazine's Official Guide to the 1985 NPTA Convention & Exposition



This new Convention publication will combine your advertising message vehicles: 3 monthly magazines, 6 Convention Daily issues, a Convention Program and an Exposition Directory to become the comprehensive Official Convention publication! Now you have no need to place your ad in nine different publications, when you can meet your marketing goals by placing it in ONE *official* publication.

Now you can substantially *reduce* your NPTA Convention promotion budget and improve your marketing program with one exciting publication insertion! This official guide (MN's October issue) distributed at the convention will feature:

Exclusive Convention Information

The only publication that will publish the complete, official schedule of events, exhibitor and suite information on Convention Saturday. With this issue we will reduce the fragmented, confusing and often incorrect information that has in the past been provided by nine different convention publications. There is now no need to duplicate your efforts when there is ONE publication that carries the most up-to-date, comprehensive and official convention information.

Exclusive Product & Supplier Directories

The only publication that will provide directories of both exhibitors and registered manufacturers' product descriptions, firm names, addresses, phone numbers, key personnel and personnel who will be on site. These directories will assure the use of this publication *long after* the Convention is over as a convenient reference guide to the key suppliers in our industry!

Comprehensive Supplier Information

The most up-to-date and complete exhibitor and suite location information will be found in the "Supplier Locator" section of *MN's Official Guide*. Included will be arrival and departure dates, exposition floor plan and booth listings, *ALL* supplier convention press releases and special announcements. *ALL* of this valuable information will reach attendees *earlier* than any other publications so that schedules can be planned most efficiently. No more spending time searching for suppliers who aren't there by paper merchant attendees.

This one's the best idea we've had in over 80 years!

Invaluable Marketing Tool

This year's inaugural edition of MN's Official Convention and Exposition Guide will combine a monthly magazine, a Convention Daily as well as an invaluable buying and marketing reference guide of key industry suppliers. It will be a much more powerful publication than all others *combined.* In addition, *MN* will also provide a "READER SERVICE CARD," so that you can enjoy direct responses to *your ad* after your return from the Convention.

Streamlined Information Process

NPTA now has an easier, more effective information system to aid suppliers in providing Convention information to the industry.

Because of our new computerized supplier pre-registration system, NPTA will already possess: arrival and departure dates, personnel information, booth and suite locations and product information that will be used in the *Official Guide.* WHY bother going through the process again on-site for other non-official convention publications?

Extensive Distribution

No other publication will speed your advertising message to as many readers as will *MN's Official Guide.* MN will be distributed to *all* ATTENDEES' DOORS (Saturday), to *all* attendees as they register, to their home offices, *and* to subscribers who are unable to attend the Convention! Total circulation of this issue will be over *10,000* copies! *MN* will also issue updates (delivered to doors) on both Sunday and Monday of all newly arrived registered manufacturer and exhibitor hospitality suite locations! *MN* will be distributed through the registration desks on Saturday, Sunday, Monday and Tuesday! Your ad can now reach the entire industry with one insertion!

Super Value

Don't miss this opportunity to reach your most important audience at the most cost efficient and convenient way! Now there is no need to create, at high cost, a brand new special-sized ad that can be used but once. Now there is no need to create special-sized inserts and enclosures also at great expense. Because of the "regular" size of the *Official Guide* you can create, or use your regular size ads. Inserts will also be accepted. The full-page price is unquestionably the best value in the industry as well!

To place your insertion order or for further information simply contact:

MN

Richard J. Lerman, MN Advertising Director
NPTA, 111 Great Neck Road, Great Neck, NY 11021

(516) 829-3070

Closing date for *MN's Official Guide to the 1985 NPTA Convention & Exposition is: AUGUST 15, 1985*

PAPER CUPS PROMOTE RESPONSIBLE DRINKING

In an attempt to aid in the fight against drunk driving, Sportservice Inc., a food and beverage supplier of major stadiums and ballparks, arenas and other entertainment centers, has developed their new "Drink Responsibility" campaign. "Drink Responsibility" features specially marked beer cups that will be manufactured and supplied in several sizes and colors by Fonda.

The beer cups will carry the slogan: "Drink Responsibly. Sobriety is no accident," as well as the Sportservice logo.

"The program is designed as a continuing reminder to the individual sports fan of the obligation to be responsible for one's own conduct in public places," said Steve Kulyk, Fonda's national accounts manager. "Sportservice posters and counter cards reinforce the reminder that overindulgence has costly consequences for the individual as well as others. We are pleased to be associated with the campaign as the supplier of the cups."

Sportservice, a subsidiary of Delaware North Companies, Inc., is headquartered in Buffalo, NY and provides food and beverage service for over 51 places in 21 states.

The Fonda Group, Inc., a leading manufacturer of standard and private label disposable paper cups, also produces disposable paper plates, napkins, food pails, bowls and trays.

PHILADELPHIA GROUP NOW LED BY BARRETT

The Paper Trade Association of Philadelphia held its 81st annual banquet at the Hershey Hotel in Philadelphia on February 13, 1985. At the event, PTA president, Sol Hyman handed down his position to Jim Barrett, president of Killhour-Commercial Paper Company in Philadelphia. In his address, president Hyman said he was confident that under Barrett's new administration, PTA will continue to have the ideals and goals that will keep it the vibrant, vital and viable organization that it has been since 1904. NPTA president John J. Buckley, Jr. was on hand to greet the members of the group.

WASTE PAPER COLLECTION RISES

The collection rate of waste paper rose to 27% in 1984, making the recovery total 20.6 million tons, the American Paper Institute recently reported in *Paper Age*. In addition, 3.2 million tons of waste paper were exported to other countries, an increase of 25% over 1983.

According to J. Rodney Edwards, vice president, paperboard group, of API, "this is an outstanding achievement by the collection industry in the U.S., demonstrating how effectively supply and demand are balanced in a free market system."

The collection of old newspapers also increased 400,000 tons over 1983, a collection rate of 29%. In addition, old corrugated container collections increased by one million tons to a total of 9.4 million tons and collections of mixed and high grade papers also went up. Mixed papers increased by over 300,000 tons.

The U.S. consumption of waste paper in January, 1985 was 2.3% over last January, reflecting a continued strong demand for waste paper. This demand is expected for the remainder of the year.

PEOPLE IN THE NEWS

Harvey S. Glanzrock has been appointed vice president of Century Papers, Inc. in Houston, TX.

Jim Kimmitt has been named manager of Inlander-Steindler Paper Company's Elk Grove Village, IL branch.

George J. Longobardi has been promoted to vice president-sales of Paper Plus Inc., in Port Reading, NJ.

Don Runyan has become national sales manager-merchant sales of Canover Industries, Maspeth, NY.

John E. Rountree has been elected chief executive officer and **Robert G. Walsh** has become corporate merchandising director of Carr Paper Company, Pomona, CA. **J. Michael Lease** has been named vice president and branch manager of the company's El Centro Division. **Don E. Dial** has been appointed vice president and branch manager of the Indio Division.

Samuel I. Antupit has been appointed president of Cartonal U.S.A., a subsidiary of Holzstoff Ltd. of Basel, Switzerland. Cartonal is located in Lake Success, NY.

James W. Franklin has been named product manager-printing paper division of Georgia-Pacific Corporation.

Janet M. Makrauer, president and treasurer of Amko Plastics Inc., has been named "Ohio Small Business Person of the Year" by the U.S. Small Business Administration. In addition, **Jim Baker** has been promoted to vice president-sales of the company.

Ken Mullenax has become director of sales for the International Envelope Company.

James A. Behan has been named marketing manager-international sales, marketing services and administration of International Paper Company, White Papers Group. **Morgan J. O'Brien** has been appointed marketing manager-bristols of the Group. **Thomas G. Derouin** has become national sales manager and **George G. Chandler** has been named manager-converting papers of the company. Also, **Steven Van Voorhis** has been appointed product manager and **Michael J. Degnan** has become product supervisor of the company's business forms papers group.

A. Kurt Renick has been elected controller and **L.H. Rogero** has been named assistant controller of the Mead Corporation. Also, **James R. Samartini** has been elected chief financial officer of the corporation.

Louis R. Busche has been elected president and chief operating officer of Monadnock Paper Mills, Inc.

Correction

In the March, 1985 issue of *MN* magazine, the tables on page 11 and the chart of page 12 gives data on imported paper in millions of tons. The information shown should had read thousands of tons.

SUCCESSFUL TRAINING: A HOW TO

Because the major investment of a paper distributorship is its people, training is a powerful tool. The job of the sales manager or other individual responsible for training is to act as an "interventionist" and to integrate training into the organization. But, first, a knowledge of the organization's problems and objectives is essential. The company trainer has to wear two hats—a business hat to ensure maximum growth of his employees, and a training expert's hat. The more training supports organizational goals and tackles problem issues, the more successful it will be.

To ensure that training has an impact on knowledge and skill development, the company must address these questions:

- Do employees have a positive attitude towards their tasks? Do they want to do a good job?
- Do people know what is expected of them? Do they understand the job design and the standards involved? Are those standards achievable?
- Do employees receive feedback from their managers on how they are doing?

Once the training need has been determined, the individual responsible for training must be equipped with the tools necessary to address the diverse needs of his employees.

To meet the demanding requirements of his employees and to ensure guaranteed professional growth, the trainer must be an effective teacher, public speaker and quasi-psychologist. He must possess the five "musts" of training. This list was developed by Michael Petty, director of instruction for the Indiana Vocational Technical College in Evansville. The list of "musts" are neither comprehensive nor very sophisticated, but Mr. Petty suggests that they be used as a training credo, perhaps hung on a wall.

I. Training Must Support The Objectives Of The Organization

A needs assessment is the best way to determine where training can help. Sources to consider include:

- Performance appraisals
- Accounting/finance
- Quality standards
- Job descriptions
- Production reports
- Inventory, shipping/receiving records
- Accident reports
- New equipment, processes, systems
- Machine downtime reports
- Personnel records on skills
- Training files
- Complaints
- Formal contracts and agreements
- Policy and procedure manuals
- Legislation and laws
- Exit interview reports
- Tracking of new hires, promotions
- Mission statements
- Organization charts
- Planning documents
- Outside research

II. Training Must Help Improve Productivity

Job/task analysis will define human factors, materials and procedures for each job so that improvement areas can be identified. Questions to consider include:

- Who does what?
- Is it effective?
- Is it efficient?
- How is it done?
- Why is it done?
- Special knowledge required?
- Special skill required?
- What equipment materials are used?
- What information is necessary?
- What information is necessary?
- How are people selected for the job?
- What are the functional relationships?
- What level of quality is required?
- What quantity is needed?
- What is the fiscal accountability?

III. The Effects Of Training Must Be Measurable

Training must provide objectives for measuring improvements. They should include any improvement task, conditions that affect the task and some performance standards. The task might be to:

- Develop, maintain, select, format, prepare, organize, modify, trouble-shoot, fabricate, conduct, explain, interact.

Conditions could include:

- Using a ball-peen hammer, without job aids, under normal working conditions, following prescribed procedures, in coordination with, upon receipt of, in consultation with, upon cue.

Performance standards might include:

- 100% accuracy ± 2mm, dead center, proper sequence, in balance, 45 wpm, in accordance with EEOC, in a workman-like manner, on schedule, within budget.

IV. Training Must Be Delivered Competently

The better the trainer is at the following techniques, the better the message will take hold.

- Lecturing
- Questioning techniques
- Demonstration
- Conscious observation
- Facilitation of discussions, simulations
- Valid test construction
- AV design and usages
- Classroom, lab, materials management
- Record keeping
- Mentoring
- Learning and motivating
- Documenting content outlines
- Planning/time management
- Synthesizing
- Interpersonal skills
- Problem-solving and decision-making

V. Training Must Be Evaluated

Did the training accomplish its goals? To find out, evaluate the trainees' responses, impact on the job and costs of delivery.

Ask trainees:

- Content fit with expectations?
- Did it meet their needs?
- Was the setting appropriate?
- Did they think they had benefited?
- Was the trainer effective?

Did the training:

- Improve quality?
- Increase quantity/productivity?
- Reduce waste?
- Enhance relationships?
- Improve efficiency/effectiveness?
- Enlarge effort or initiative?
- Improve trainees' attitudes?

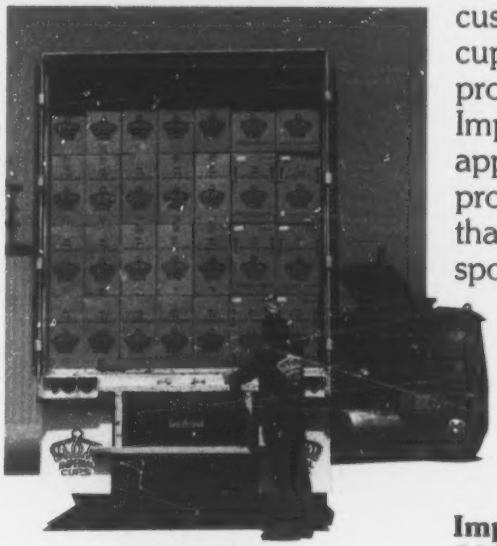
How much did it cost?

- Participants' wages
- Lost work time/work replacements
- Trainers' wages
- Materials and supplies
- Consultant fees
- Travel expenses
- Training facility overhead

Imperial Cup – the Uncommon Carrier

When you make the finest quality paper and plastic cups, you don't take chances on common carrier overages, shortages, damages and delays. That's why we have Imperial's own truck fleet to assure accurate on-time delivery, in cases that look like they just came off the production line.

Quality and service are important to Imperial because they're important to our customers. Damaged cups cut into your profits, so take the Imperial uncommon approach to solve the problem. We guarantee that our service will spoil you.



Say hello to Imperial Cup – the uncommon carrier and kiss the usual grief and losses good-bye.

Imperial Cup Corporation
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(419) 673-0711 in Ohio
(800) 537-4141 Toll Free

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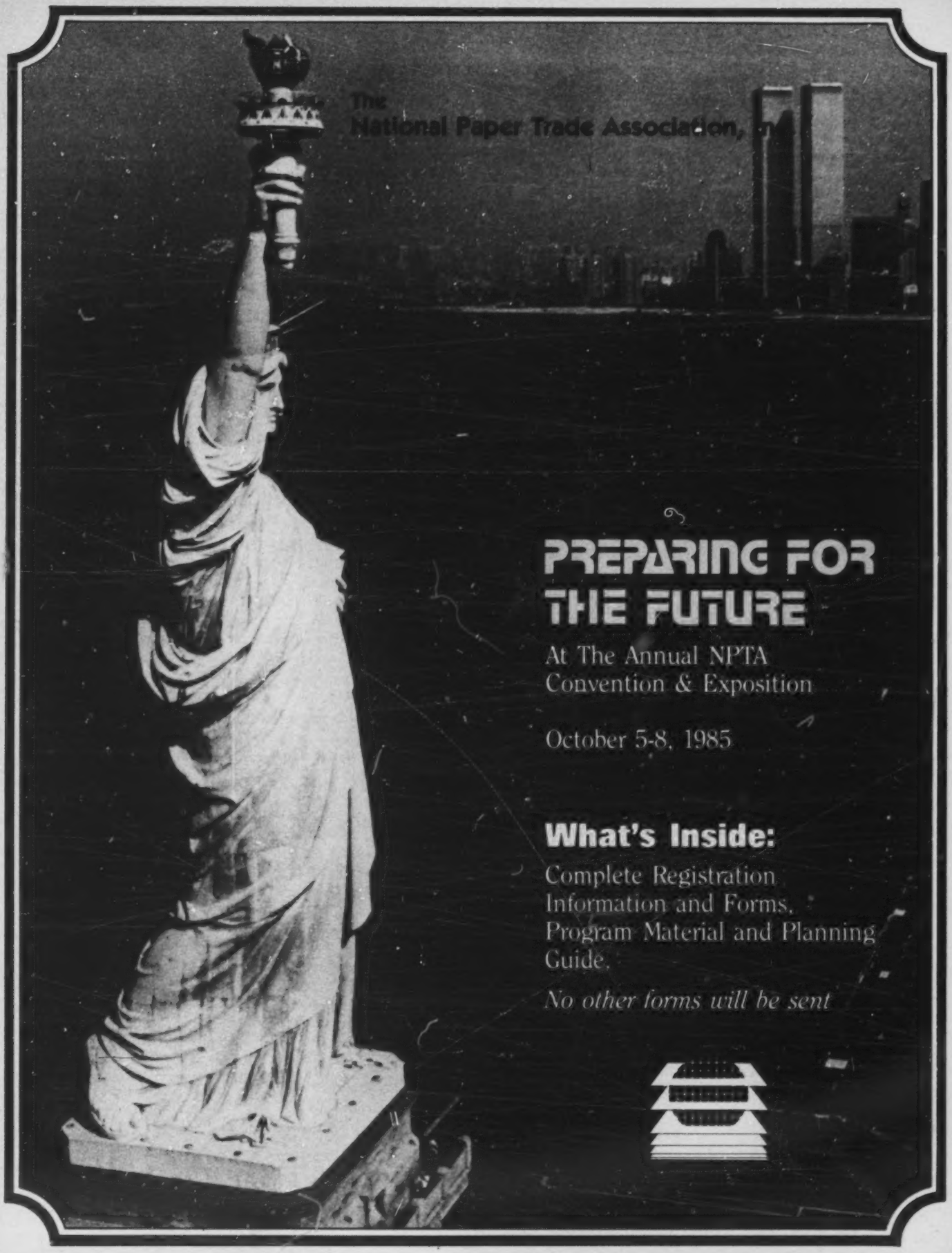
Your Cup of Excellence


The
National Paper Trade Association, Inc.
PREPARING FOR
THE FUTURE
At The Annual NPTA
Convention & Exposition
October 5-8, 1985
What's Inside:
Complete Registration
Information and Forms,
Program Material and Planning
Guide.
No other forms will be sent

PREPARING FOR THE FUTURE: OCTOBER 5-8, 1985

The NPTA Annual Convention and Paper/Plastics & Allied Products Expo is coming to the Big Apple

"Always be prepared." The Boy Scouts of America have been telling us that for nearly a century. Is anyone listening? Business people should be and a visit to NPTA's Annual Convention and Exposition will explain why.

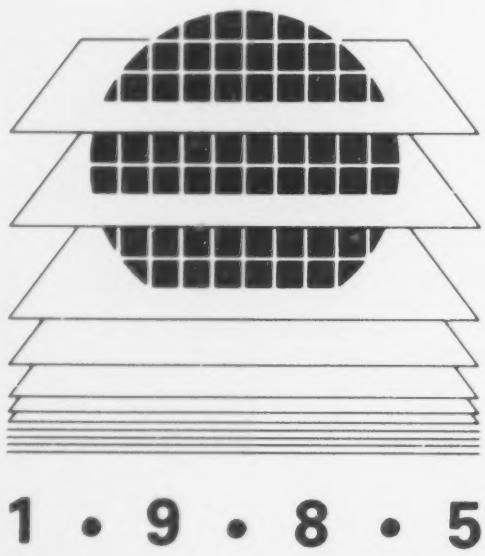
Preparation for the future requires three things: A firm grasp of the present, knowledge of the past and a keen sense of direction that leads to tomorrow. Merchants will attend this most important event to gain a better understanding of how these three elements work together to shape their future.

Knowledge of the past, specifically the past year, is studied at the Convention. Trends that have affected the paper, plastics and allied products distribution industry will be discussed at the Convention and on the floor of the Show. Merchants from every part of the country will be there to review the activities of the past year.

The merchants attending will seek to strengthen their grip on the present at a variety of Convention sessions. They know that business is changing and they need more information about the changing industry of which they are a part.

The leaders of the paper distribution industry are those who have a keen sense of direction that is leading them into tomorrow. These are the people who feel quite at home in the future. The 1985 Annual Convention of the National Paper Trade Association brings the leaders together, shows them the products of tomorrow, lets them in on the changes ahead in both business management and commodities, and helps them clarify the affects technology will have on their business operation in the coming year.

Live in the future by preparing for it today. 6,000 people will find out that the best way to get moving in the right direction is by attending the 1985 NPTA Annual Convention & Exposition in New York City.



The 1985 Convention and Exposition Logo

Convention Logo: A Changing Industry

"The 1985 Convention logo symbolizes the expanding paper distribution industry while addressing the impact technology is having on paper, plastics and allied products distribution," said Frank J. Viegas, NPTA Chairman of the Board. "The future must be met through careful preparation. Our industry is growing and merchants must prepare for tomorrow or be left behind," Viegas said.

The 1985 Convention logo shows an ever-increasing stack of papers reaching for the sun and so represents the growing use of paper products and the growing distribution industry. The sun is also illustrated as a computer chip; technology has had a great impact on both paper merchant operations and customer demand for paper products. "Computers have had a major impact on how we run our business and have actually fueled the demand for the products we sell and distribute," said Viegas. "As we focus on the future of our industry, we see that the challenges of growth and benefits of technology cannot be ignored. The 1985 NPTA Annual Convention is an important time for paper merchants and their suppliers to come together and prepare for the future."

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Rich Worldwide Travel, the official travel agent for the NPTA Annual Convention and Paper/Plastics and Allied Products Exposition, can save you money — a lot of money!

And you are not limited to one or two airlines. **Rich Worldwide** can save you money on *any* airline you choose simply because they book so many seats each year on *all* major carriers. The truth is that they can book airline seats *cheaper* than you can — and you save.

ANNUAL CONVENTION SCHEDULE OF MEETINGS

SATURDAY

Winning With People: 10:00 a.m. - 12:30 p.m.

This exhilarating, two and one-half hour presentation by Jack Carew deals with the quality of human relationships and clearly demonstrates the value of cooperation and teamwork, and is hosted by the Young Executives Forum of NPTA. *This session is open to all.*

Instantly, the audience will be involved in an exciting personal event that provides the critical awareness of how their attitudes and communication behaviors affect others.

They are then given the practical tools for behavior modification as it relates to the long-term relationship versus temporary arrangements.

Each participant will then focus on: the creative management of anger, stress reduction and positive coping, initiating new relationships, rebuilding broken relationships.

Next the audience is engaged in a practical, group problem-solving event requiring each team member to be a thoughtful, caring communicator. As the teams compete for honors and humorous prizes, each participant experiences the value of warm, sensitive communication and collaboration during this teambuilding adventure.

The entire experience is fun, exciting, involving, and non-threatening.

Young Executives Luncheon:
12:30 p.m. - 1:30 p.m.

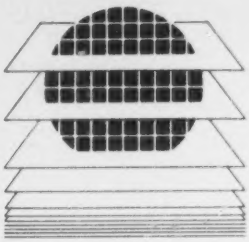
This special luncheon for young executives is a time when up-and-coming managers can meet and share experiences. Tickets are required: $35.00 (Use Special Events Form to order tickets.)

Young Executives Forum Workshop:
1:30 p.m. - 2:30 p.m.

This workshop is open *only* to members of the NPTA Young Executives Forum. To join the YEF, contact NPTA at 516-829-3070.

Jack Carew

ANNUAL CONVENTION SCHEDULE/CONTINUED



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Mayor Ed Koch

D. Bruce Merrifield

Henry Kissinger

Customer Base Expansion: Improving Your Competitive Edge: 3:00 p.m. - 4:30 p.m.

This year the Industrial Paper Division of NPTA will present a session on "Customer Base Expansion: Improving Your Competitive Edge," the second in the New Frontiers in Industrial Paper Distribution series.

Discussed will be ways merchants can better market their company's services and products, through public relations activities, brochure development, promotional activities and client presentations. Customer expansion will be discussed both from the vantage point of new products to current customers and additional products to attract new customers. The objective is to make each customer and each delivery more profitable and cost effective. Research has shown that customers are buying products that paper merchants could very easily supply. This session will help merchants see the advantages of better merchandising of accounts and the additional product needs of current and prospective customers.

SUNDAY

General Business Session: 10:00 a.m. - 11:30 a.m.

This program is always a most informative session for Convention attendees. In addition to a well-known economist and keynote speaker, New York City's Mayor Ed Koch has been invited to welcome all to the NPTA Annual Convention and Exposition. Mayor Koch, a nationally known politician and leader, will greet paper merchants and suppliers from around the country and welcome them to the "Big Apple."

NPTA Annual Business Meeting:
11:30 a.m. - 12:00 Noon
NPTA Members Only

The Annual Business Meeting of the National Paper Trade Association is an opportunity for members to learn of the activities of the Association in the past year. It is also a time to help forge the direction the Association will take in the industry.

MONDAY

Continental Breakfast: 8:30 a.m. - 9:30 a.m.

The exhibitors at the 1985 Exposition invite all to a continental breakfast held on the floor of the Show. It is their way of saying "Thank You" to all of their friends in the paper distribution industry.

Implementing Successful Printing Paper Marketing Programs: 10:30 a.m. - 12:00 Noon

Most paper distributors have many of their past "new" products still in stock. How can the odds be increased when launching a new printing paper product line and cut down on potential cash traps? This presentation, by noted marketing expert D. Bruce Merrifield, identifies 10 marketing guidelines that will help merchants select products (new or old) that will fit the distributor's competitive strategy. It also reviews the process that will help maintain the promotional persistance and focus necessary to get the product line going.

The key benefits of Merrifield's approach are to select printing paper product lines that will yield the best return on invested time as well as inventory; to reduce future cash traps; and fit the scope of most productive customers and the company's style of business. This is a meeting of the Printing Paper Division of NPTA.

Preparing For The Future Reception:
12:00 Noon - 12:30 p.m.

As a prelude to the Chairman's Luncheon, this cash bar reception is an opportunity for all Convention attendees to meet and greet one another.

Chairman's Luncheon: 12:30 p.m. - 2:30 p.m.

The highlight of the 1985 Convention and Exposition will be the annual Chairman's Luncheon with proceeds going to support the Paper And Plastics Education Research (PAPER) Foundation. At this event, the Stanley O. Styles Industry Excellence Award will be given to an industry leader.

The keynote speaker for the event will be Henry Kissinger, former Secretary of State and internationally known statesman. His message about the role of the United States in foreign affairs will be valuable for all.

The Chairman's Luncheon is a very special event and Convention registrants are encouraged to purchase tickets early. Luncheon tickets will *not* be available on-site. Tickets are $75.00 each. $15.00 of each ticket represents a donation to the PAPER Foundation. Tables of 10 are $700. (Use the Special Events Order Form to order tickets.)

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HENRY KISSINGER TO KEYNOTE AT CHAIRMAN'S LUNCHEON

Recipient of the Nobel Peace Prize and the Presidential Medal of Freedom

Dr. Kissinger has been praised as one of the most brilliant Secretaries of State in the history of the United States. His rare eloquence and wit have made him one of the most popular speakers—not only here in America, but throughout the world! A Secretary of State under two Presidents, he was also National Security Advisor for six years, and continues to be sought after for his expertise in foreign affairs—having most recently served as Chairman of the Bipartisan Commission on Central America.

Upon leaving the State Department, Dr. Kissinger accepted the positions of University Professor of Diplomacy at the School of Foreign Service and Counselor to the Center for Strategic and International Studies, both at Georgetown University. He is also a Director of the Foreign Policy Association, a Counselor of the Chase Manhattan Bank and a member of its International Advisory Committee, and a member of the Council on Foreign Relations. Among his other activities, he is Chairman of the Board of International House, Trustee of the Rockefeller Brothers Fund, Trustee of the Metropolitan Museum of Art, and Contributing Analyst for ABC News.

Among the awards Dr. Kissinger has received have been the Nobel Peace Prize in 1973 and the Presidential Medal of Freedom, this nation's highest civilian award, in 1977.

Dr. Kissinger was born in Fuerth, Germany, on May 27, 1923, came to the United States in 1938, and was naturalized a United States citizen on June 19, 1943. He served in the US Army from 1943 to 1946. He received a BA degree summa cum laude at Harvard College in 1950 and the MA and PhD degrees at Harvard University in 1952 and 1954.

From 1954 until 1969 he was a member of the faculty of Harvard University, both in the Department of Government and the Center for International Affairs. He was Director of the Harvard International Seminar from 1951 to 1969. He served as consultant to the White House during the Kennedy Administration and to the Department of State during the Johnson Administration.

Dr. Kissinger married the former Nancy Sharon Maginnes on March 30, 1974. He is the father of two children, Elizabeth and David, by a previous marriage.

Peter Mullins

Paper Merchant Retail Cash & Carry - A to Z: 2:30 p.m. - 4:00 p.m.

A look at the necessary ingredients to run a successful paper merchant retail operation. Among the subjects discussed will be store layout, advertising promotion and product selection. This is a program that should not be missed by anyone operating a store or interested in starting such an operation.

TUESDAY

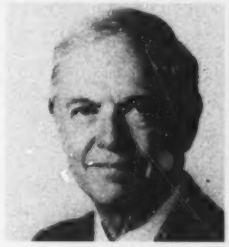
Managing Customer and Product Line Profitability: 9:00 a.m. - 11:00 a.m.

Dr. Peter Mullins, the nationally recognized financial management consultant, will present this "Management Conference" program for those who want to know how to manage the profitability of both customers and products more effectively. Dr. Mullins is presenting a series of full-day workshops for NPTA on this subject around the country. He will offer this special two hour session for those who may not have had the opportunity to participate in his day-long session.

This subject is vital for paper distributors and is targeted at top management. It will help Convention attendees focus on what the merchant should do to identify, inventory and deal with suppliers more effectively.

Establishing the Highest Value for Your Business: 9:00 a.m. - 11:00 a.m.

Those who own their companies know the importance of determining its value. The Geneva Corporation specializes in providing small to mid-size business owners with information and consultation about selling their businesses, determining value and planning the transfer of ownership within the family. Gerald G. Griffin, a corporate director of the Geneva Corporation, will make the presentation.



To determine the price of a business, a company's past and current financials must be recast to reflect the true, higher current value. And more importantly, future earnings and cash flow must be projected based on valid, objective market research. This presentation will give those attending good insight into what is important in this evaluation and how to go about it.

Management Roundtable: 9:00 a.m. - 11:00 a.m.

This part of the Annual Convention gives participants a chance to form discussion groups and share thoughts and concerns in a more formal way. Roundtable discussion groups have proven to be a generator of both new ideas and solutions to old problems. Those electing to be involved in the Management Roundtable will select the topic; NPTA will structure the session.

To avoid any conflicts of interest, competitors will not be seated at the same table. This means that those wishing to participate must pre-register with the NPTA headquarters office. (Use the Meeting Attendance Form.)

SPOUSES PLAN 'EXPERIENCE NY'

New York, The 'Big Apple,' holds some special experiences for Convention Spouses this year.

It's going to be a long time before the NPTA Convention returns to one of the greatest cities on earth. This could be Convention spouses' last chance to see a few of the obvious sights and attractions that may have been overlooked during previous visits.

And, even if guests have been there before, all will agree they are worth seeing again, after all, it's going to be a long time...

SATURDAY, OCTOBER 5, 1985:
12:30 - 4:00 p.m.

Since many spouses will be checking into the hotel on Saturday morning, NPTA has scheduled a leisurely elegant luncheon at one of New York's finest hotels, the Sheraton Centre. After lunch, guests will stroll along the world famous glass canyons of Avenue of the Americas, past the headquarters of the media industry and other corporate giants. Then Convention spouses will proceed to one of the most unique experiences in town, "The New York Experience," a multisensory audio visual extravaganza that both dazzles and educates people about the story of "The Big Apple," past and present. It is an unforgettable experience that all guests will remember for a long time to come.

Cost: $37.00 per person

SUNDAY, OCTOBER 6, 1985:
12:00 Noon - 5:00 p.m.

The day will begin with a lovely tour in our motorcoach of the outdoor gardens of the New York Botanical Gardens. After these breath-taking views, it will be off to a lovely luncheon on the grounds and the gardens of the Snuff Mill Inn overlooking the river and a cascading waterfall.

NEW AND NOTEABLE

Young Executives: This year the extensive young executives program has been moved to Saturday. The morning session is open to all, but the special luncheon and afternoon workshop require tickets. (See the Schedule of Events for details.)

General Business Session: This program moves to Sunday at 10:00 a.m.. An economist will be on-hand this year as well as a special keynote speaker. New York City's Mayor, Ed Koch, has been invited to welcome Convention goers to New York.

Chairman's Luncheon: This year the luncheon moves to Monday where the presentation of the Stanley O. Styles Industry Excellence Award will be made. The keynote speaker will be Henry Kissinger. (Tickets Required.)

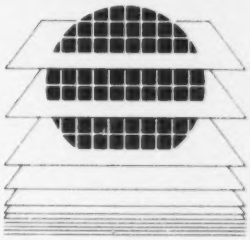
Exhibits: A change in exhibit hours will bring Convention attendees to the Show on Monday morning from 8:30 a.m. - 12:30 p.m.. When the Show opens on Monday at 8:30 a.m., the exhibitors will host a continental breakfast on the floor of the show for all Convention registrants.

Management Conference Programs: Special management programs on Tuesday morning will include roundtable discussions for the first time. (See the Schedule of Events for details.)

After lunch, Convention spouses will take an hour-long tour of the Glass Conservatory containing thousands of exotic flowers, trees and plants. The professional guide will be an expert from the education department of the gardens and this special tour promises to be both interesting and informative. Included will be a visit to the excellent flower and gift shop on the premises.

On the way back, guests will tour the Upper West Side including the Cathedral of St. John the Divine, Grant's Tomb, Columbia University and an overlook of the Hudson River.

Cost: $43.00 per person



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MONDAY, OCTOBER 7, 1985:
9:30 a.m .- 12:00 Noon

The morning will begin with a visit to the United Nations building where Convention spouses will be personally welcomed by a member of the United States delegation Committee and will be taken on a tour of the building, including the meeting rooms, the art works and exhibits. There will be an opportunity to visit the unusually lovely gift shop at the United Nations. If weather permits, guests can stroll through the grounds of the building. Then on to a bus for an exciting tour of Sutton Place and other east side points of interest.

Cost: $17.00 per person

OFFICIAL HOTELS AND RATES FOR 1985 NPTA CONVENTION AND EXPOSITION

Room Rates are Confirmed on a Space Available Basis. Reserve Your Room Early.

HOTELS	ROOMS		SUITES			*ONE TIME CHARGE NON-EXHIBITOR SUPPLIER REGISTRATION FEE PAID TO NPTA
	Per Diem Rates SINGLE	DOUBLE	SUITE	NUMBER OF PEOPLE *(for reception)*	HOTEL SUITE RATES PER DIEM	
NEW YORK HILTON 1335 Avenue of the Americas	$125, $140, $150, $160	$150, $165, $175, $185	Parlor & one bdrm. Parlor & two bdrms. Major Suites	10 10 25-85	$325-$360 $435-$470 $490-$1760	$500 $500 $750
NEW YORK HILTON EXECUTIVE TOWERS 1335 Avenue of the Americas	$195	$195 39th floor - 44th floor				
SHERATON CENTRE Seventh Avenue at 52nd Street	$120, $135, $155	$140, $155, $175	Empire Parlor & one bdrm Governor Parlor & one bdrm. Skyline Parlor & one bdrm. **State Parlor & one bdrm.	8 12 20 23	$330 $355 $430 $480	$500 $500 $650 $550
			**State Suites have a maximum of three (3) connecting bedrooms. All other Suites have a maximum of two (2) connecting bedrooms.			
SHERATON CENTRE TOWERS Seventh Avenue at 52nd Street	$200	$220 46th floor - 50th floor				
SHERATON CITY SQUIRE 790 Seventh Avenue at 52nd Street	$110, $120	$120, $135	Parlor & one bdrm. Parlor & two bdrms.	12 12	$280-$380 $385-$485	$450 $450
WARWICK 54th Street on Avenue of the Americas	$130, $140, $150	$145, $155, $165	Parlor & one bdrm. Parlor & two bdrms.	13 15	$210-$295 $315-$410	$450 $450

*Non-exhibiting Supplier, Manufacturers' Representatives and Nonmember Paper Merchant Registration Fee. One-Time charge payable to NPTA (Do Not Send a Check). You will be invoiced upon confirmation of your suite. This fee is to be paid *only* by Non-Exhibiting Suppliers who maintain a hospitality suite. Suite fees for exhibitors are included in booth rental fee. Registration fee includes admissions to all meetings and the Exposition. There will be a $2 per person occupancy tax and 8¼% sales tax added to daily rates.

NPTA members pay no registration fee for suites.

HOTEL/SUITE RESERVATION

No other form will be sent

ROOMS ONLY - Mail To:	SUITES OR SUITES PLUS ROOMS - Mail To:
NPTA Housing Bureau - 6th Fl. 2 Columbus Circle New York, N.Y. 10019	National Paper Trade Association 111 Great Neck Road Great Neck, N.Y. 11021 (516) 829-3070

Refer to Accompanying Listing of Hotels and Rates

INFORMATION AND DIRECTIONS

1. Room assignments will be made in order of receipt by the Housing Bureau. Suites will be assigned by NPTA and will not be confirmed until **the week of July 22.**
2. Accommodations are furnished solely for sleeping and lodging purposes. Rooms may **NOT** be used for display of merchandise.
3. Official convention hotel rates are in effect only until September 6, 1985.
4. No telephone requests will be taken. Use this official form only.
5. Cancellations and changes should be **made in writing** through the Housing Bureau for rooms until September 13, 1985; directly to the hotel after that date. Changes in suites must be directed to NPTA Headquarters.
6. Don't be a "No-Show"—please cancel your reservations if you are unable to attend.
7. Please type all information required.

HOTEL PREFERENCE

1st Choice _____

2nd Choice _____

3rd Choice _____

ROOM CODES*

S = Single Room (One Occupant)
D = Double Room (Double Bed)
T = Twin Room (Two Single Beds)
TS = Tower Single (One Occupant)
TD = Tower Double (Double Bed)
TT = Tower Twin (Two Single Beds)

SUITES

P + 1 = Parlor + 1 Bedroom
P + 2 = Parlor + 2 Bedrooms

*ROOM CODE	RATE REQUESTED	FIRST OCCUPANT	SECOND OCCUPANT	ARRIVAL (Date/Time)	DEPARTURE (Date/Time)

Please bracket names of those sharing rooms

(Photocopy this form if additional space is needed and for your records)

Please Mail Confirmation(s) to:

NAME _____ COMPANY _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PHONE _____ CREDIT CARD NAME FOR GUARANTEE _____

CARD # _____ EXP. DATE _____ TODAY'S DATE _____

PUBLIC SPACE REQUEST FORM

NATIONAL PAPER TRADE ASSOCIATION, INC.

PREPARING FOR THE FUTURE

Paper/Plastics and Allied Products
Exposition

October 5-7, 1985 New York Hilton • Sheraton Centre Hotels

Fill Out This Form To:	Return Completed Form To:
Make sure you get the public space you need! Photocopy for your records.	National Paper Trade Association, inc. 111 Great Neck Road Great Neck, New York 11021 516-829-3070

To avoid conflicts between scheduled functions at the Convention, please fill out the information below and return it to NPTA. We will aid you in securing your public space at the hotels (all of which is held by NPTA) and support you with the hotel convention and/or catering staff.

NPTA will confirm your arrangements and solidify your plans. Badge request forms will follow.

Please complete the information needed below in order to reserve space for your function.

Yes, we would like to hold a meeting ____; meal ____ function during the 1985 NPTA Convention!

Please reserve a room for ____ people on _____
(write day and date)

Please send us ____ room set up charts; ____ menu selection brochures as soon as possible.

Name: _____ Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone #: _____

Signature: _____

NATIONAL PAPER TRADE ASSOCIATION, INC.

PREPARING FOR THE FUTURE

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Paper/Plastics and Allied Products
Exposition

October 5-7, 1985 New York Hilton • Sheraton Centre Hotels

SPECIAL EVENTS TICKETS ORDER FORM

No other forms will be sent

Deadline	Mail To	Payment
Order Form Must Be Received At NPTA By September 6, 1985 Photocopy for your records.	National Paper Trade Association, inc. 111 Great Neck Road Great Neck, New York 11021	PAYMENT MUST ACCOMPANY THIS FORM. Tickets for Special Events Are Not Refundable.

TICKETS FOR ALL EVENTS MAY NOT BE AVAILABLE ON SITE: ATTENDANCE IS LIMITED

Chairman's Luncheon: *Stanley O. Styles Industry Excellence Award Presentation: Henry Kissinger Keynote Speaker*
Monday, October 7, 1985
12:30 p.m. - 2:30 p.m.

($15 of each ticket represents a donation to the PAPER Foundation.)
Please Reserve:
_____ tickets at $75.00 each $ _____
_____ tables of 10 at $700 $ _____

Young Executives Forum: *Winning With People*
Reception, Luncheon, Special Meeting
Saturday, October 5, 1985
12:30 p.m. - 2:30 p.m.

Please Reserve:
_____ tickets at $35.00 each $ _____

Spouses Program: *Experience New York*

Saturday, October 5, 1985
12:00 Noon - 4:00 p.m.
"NY Experience"

Please Reserve:
_____ tickets at $37.00 each $ _____

Sunday, October 6, 1985
12:00 Noon - 5:00 p.m.
"Days of Wine & Roses"

_____ tickets at $43.00 each $ _____

Monday, October 7, 1985
9:30 a.m. - 12:00 Noon
"United Nations"

_____ tickets at $17.00 each $ _____

_____ **TOTAL FEE REMITTED** **$** _____

All Funds Must Be In U.S. Dollars

Names of Young Executives Forum Participants: _____

_____

Name of Spouses Program Participants:

Sat.: _____

Sun.: _____

Mon.: _____

Signature: _____

Send tickets to: _____

Company: _____

Address: _____ Phone: _____

City: _____ State: _____ Zip: _____

OFFICE USE ONLY
C-Ticket # _____
Y-Ticket # _____
S1-Ticket # _____
S2-Ticket # _____
S3-Ticket # _____
CHECK # ____ AMT. ____

MEETING ATTENDANCE

NATIONAL PAPER TRADE ASSOCIATION, INC.

PREPARING FOR THE FUTURE

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Annual Convention
AND PAPER PLASTICS AND ALLIED PRODUCTS
Exposition

October 5-8, 1985 New York Hilton • Sheraton Centre Hotels

Please return form to NPTA by September 6, 1985.

National Paper Trade Association, inc.
111 Great Neck Road, Great Neck, New York 11021; 516-829-3070

PLEASE LIST THE NUMBER OF PEOPLE FROM YOUR FIRM WHO WILL ATTEND EACH SESSION

SATURDAY, OCTOBER 5, 1985

____ 10:00 a.m. - 12:30 p.m.
Winning with People (a Young Executives Program) presented by Jack Carew - open to all

____ 3:00 p.m. - 4:30 p.m.
Customer Base Expansion: Improving Your Competitive Edge — an Industrial Paper Division Session

SUNDAY, OCTOBER 6, 1985

____ 10:00 a.m. - 11:30 a.m.
General Business Session with **introduction by Mayor Ed Koch**

____ 11:30 - 12:00 Noon
NPTA Annual Business Meeting *(members only)*

MONDAY, OCTOBER 7, 1985

____ 8:30 a.m. - 9:30 a.m.
Continental Breakfast (free) on the floor of the Exposition

____ 10:30 a.m. - 12:00 Noon
Implementing Successful Printing Paper Marketing Programs — a Printing Paper Division Session

(Monday, continued)

____ 12:00 Noon - 12:30 p.m.
"Preparing for the Future" reception (cash bar)

____ 12:30 p.m. - 2:30 p.m.
Chairman's Luncheon
Henry Kissinger, Industry Award Presentation (tickets required)

____ 2:30 p.m. - 4:00 p.m.
Paper Merchant Retail Cash & Carry — A to Z

TUESDAY, OCTOBER 8, 1985

____ 9:00 a.m. - 11:00 a.m.
Managing Customer and Product Line Profitability presented by Peter Mullins

____ 9:00 a.m. - 11:00 a.m.
Establishing the highest value for your business

____ 9:00 a.m .- 11:00 a.m.
Management Roundtable (pre-registration required)

IMPORTANT: This information will help NPTA determine the room size, seating, traffic flow, and amount of handout materials necessary for each session. You are not obligated to attend sessions checked. Please take advantage of all Convention activities. (photocopy for your records)

Jack Carew
President

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We're not the biggest in the business. But many fine companies believe we're the *best!* Companies such as Cincinnati Cordage, Dixon Paper Company and Unisource who received more from the Carew System than they expected... and they expected a lot. Some of their testimonials are almost embarrassing.

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Dept. N, 25528 Genesee Trail Road
Golden, CO 80401

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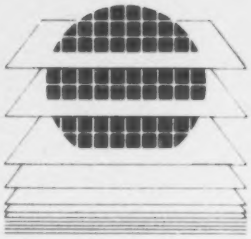
Carew POSITIONAL™ SELLING Systems, Inc

EXPOSITION ALIVE, WELL, GROWING



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The centerpiece of any annual industry meeting is the place that acts like a magnet to attract merchants and suppliers. It is that place where the largest number of buyers and sellers pass through.

There is no doubt that the centerpiece of the NPTA convention continues to be the Paper Plastics & Allied Products Exposition.

HISTORY OF THE EVENT

The first Exposition, called the Paper Show, was presented as a room show at the Waldorf-Astoria, New York in the spring of 1936. The New York Show was held each spring at the Waldorf from 1936 to 1943. The first post-World War II room show was in 1949. The shows then continued until the spring of 1960.

The first Chicago show was held in 1938, as a room show at the Stevens Hotel (now the Conrad Hilton). This pattern continued until after the 1941 event. The room show was then continued in the fall of 1949. The first booth show was held in 1952 at the Edgewater Beach Hotel in Chicago.

Booth shows continued in Chicago and began in New York in 1963. The show became an annual event in 1968. And since that time, the show has rotated between New York and Chicago.

Paper/Plastics & Allied Products Exposition Hours

In the New York Hilton

Saturday, October 5: 10:00 a.m. - 5:00 p.m.
Sunday, October 6: 11:00 a.m. - 4:00 p.m.
Monday, October 7: 8:30 a.m. - 12:30 p.m.

CHANGES BEGAN IN 1974

In response to changing industry composition and needs, the Paper Show began to change in 1974. First the name: The Paper Show became the Paper/Plastics & Allied Products Exposition. This reflected the growing importance of plastics in the paper distribution industry. The meeting moved to the Hyatt Regency Hotel in 1978 to provide the industry with a more convenient and elegant environment to conduct its annual business.

1981 marked the first Exposition held in a separate auditorium, outside the convention hotel in New Orleans. It was also the first break from the New York/Chicago rotation. The success of this meeting indicated a desire of the industry to move the Convention and Exposition around the country. In future years, the convention will stop in Boston (1986), Atlanta (1987), Anaheim (1989) and New Orleans (1991).

EXPOSITION SIZE GROWS

Since its inauguration in 1936, with 74 suppliers participating in a room show, the Exposition has grown. The largest show through 1970 was 150 exhibitors occupying 190 booths. During the 1970's, the Exposition declined slightly in total participation to 125 exhibiting companies and a total of 175 booths.

The reason for the decline was a reorganization and decline in the number of suppliers selling to the industrial paper and plastics side of the paper distribution industry. The composition of the type of suppliers involved in the Exposition has changed during the years.

During the past 5 years the number of exhibits, total number of booths and the overall attendance has grown steadily. The Exposition has grown to an event that has averaged 155 exhibitor companies, occupying 222 booths.

Total merchant attendance has averaged 1650 during the past 5 years. This number translates into approximately 825 different paper merchant firms attending the exposition, each one looking to meet their present suppliers and also looking for new products and ideas to distribute.

The Exposition in 1984 registered its highest number of paper merchants in over 10 years—2000 distributors and executives, representing 1010 companies nationwide registered.

This general positive attendance trend is evident for a number of reasons. First and foremost, paper merchants look upon the Exposition as the easiest, most convenient way to meet with their big suppliers. Also, they can see what new products are being offered. Merchants implement their supplier contacts throughout the year with other meetings at their offices and at other convention locations.

Exposition management has worked hard to improve the service levels, reduce the hassels and improve the appearance of the exhibit. They also have been aggressively spreading the word about the Exposition to paper merchants and suppliers far and wide.

The Association is committed to improving the Exposition and keeping it the informational and marketplace center of the Annual Convention. A majority of the paper distribution industry supports this concept and they continue to look toward the Exposition as an important meeting.

(Charts on pg. 28)

ALL SOFTWARE COMPANIES KNOW SOFTWARE.

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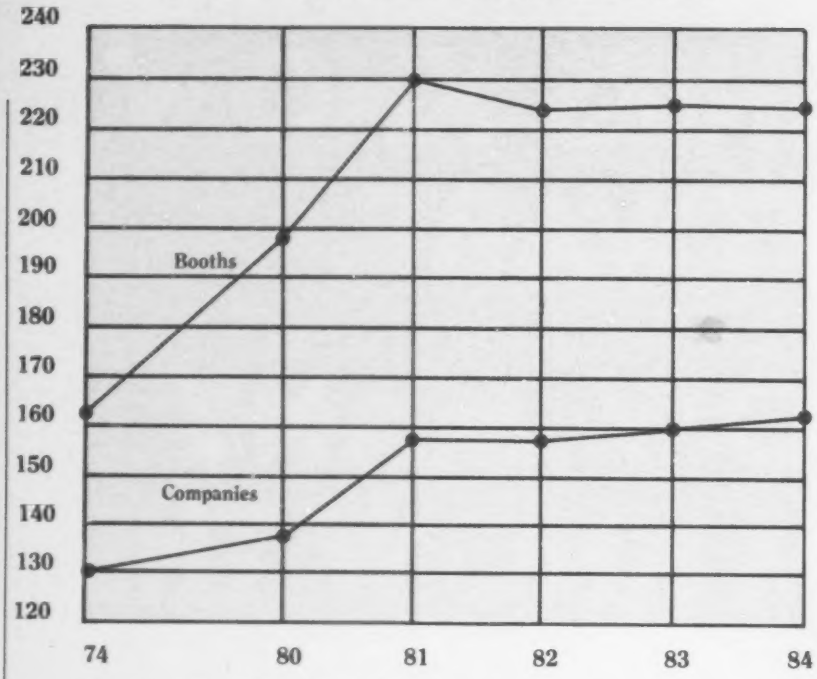
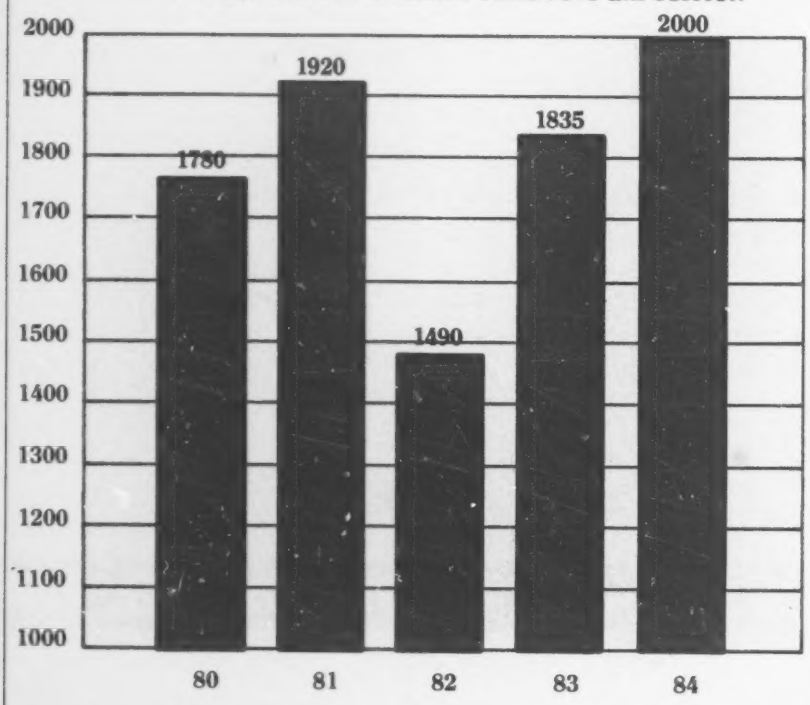
COMPANIES EXHIBITING
PAPER/PLASTICS & ALLIED PRODUCTS EXPOSITION



Source: National Paper Trade Association, inc.
(See Table For Detail)

MERCHANT ATTENDANCE
PAPER/PLASTICS & ALLIED PRODUCTS EXPOSITION



Source: National Paper Trade Association, inc.

COMPANIES EXHIBITING
PAPER/PLASTICS & ALLIED PRODUCTS EXPOSITION

Year	Companies	Booths
1974	130	163
1980	138	199
1981	157	230
1982	156	224
1983	160	227
1984	163	226

Source: National Paper Trade Association, inc.

OCTOBER IN NEW YORK CITY

NPTA's Annual Convention on October 5-8, 1985, takes place this year in the Big Apple—New York City! This eclectic city is full of things to see and do, all year round. As just a sample of what's going on during Convention time, NPTA has compiled a calendar of events of some of New York's sights and attractions...all available this Fall.

For sports fanatics, October marks the beginning of a variety of seasons: plan to catch a Giants game or a race at Belmont while in town! October is also the month for art buffs and theater goers. Every museum in the Big Apple is having a special exhibit of some kind and Broadway will be the host of many new and exciting shows. For parade-lovers, Fifth Ave. comes alive with a variety of interesting and colorful parades.

NPTA not only hopes all who attend enjoy the 1985 Annual Convention and Exposition, but also take advantage of the many, many things that New York City has to offer. Experience October in the Big Apple!

Sports:

- Football season at Giants stadium.
- NY Rangers hockey season at Madison Square Garden.
- NY Knicks basketball season at Madison Square Garden (opens late October).
- Thoroughbred racing at Belmont Park and Aqueduct Racetrack, both in Queens.

- New York City Marathon, five-borough run (Oct. 27).
- Ice skating at Rockefeller Center (opens early Oct.).

Parades and Festivals:

- Pulaski Day Parade, Fifth Ave. (Oct. 6).
- Irving Place Festival, Gramercy Park (Oct. 13).
- Hispanic-American Day Parade, Fifth Ave. (Oct. 13)
- Columbus Day Parade, Fifth Ave. (Oct. 14).
- Massing of the Colors Parade, Fifth Ave. (Oct. 20).

Arts and Special Shows:

- New York City Opera, Lincoln Center (Sept. - Nov.).
- New York Film Festival, Lincoln Center (Sept. - early Oct.).
- Disney's World on Ice, Madison Square Garden (Sept. - early Oct.).
- "High Style: Eight Decades of Vanguard Design," Whitney Museum (Sept. - Jan.).
- "Ralston Crawford," Whitney Museum (Oct. 3 - Jan.).
- "The India Exhibit," Metropolitan Museum of Art (Oct.).
- "Ancient Greece and the Amins Painter," Metropolitan Museum of Art, (Oct.).

Things to See:

- **The Lady:** Visit the Statue of Liberty and see her full-scale renovation in process. Her original torch (now removed) is in the Statue workshop for viewing up close and visit the Museum of Immigration in the Statue's base.
- **South Street Seaport:** See Fulton Market, a huge pavillion containing hundreds of cafes and food markets so you can taste every one of your New York favorites, from pizza to hot dogs to swordfish at the Market's Coho restaurant. Browse through the many boutiques and shops that line the cobblestone walks and see "South Street Venture," the multi-media show that interprets this historic, 11-block area.
- **Theatre Museum:** In the heart of the theatre district, this museum takes you through the history of NYC's Broadway including exciting, new exhibits every month.
- **The New Rockefeller Sights:** This NYC Plaza has been redesigned to include handsome new restaurants and house the Channel Gardens, in bloom with many floral displays.
- **The New Chemical Gallery:** Chemical Bank has opened a new, free, permanent exhibit on Park Ave. The galleries will showcase the treasures of local museums and libraries, such as the Museum of the City of New York, Harlem's Studio Museum, and the Historical Society.

...**And also all the regular New York City favorites:** The Empire State Building, The World Trade Center, The RCA Building, Central Park, SoHo, Chinatown, the Fifth Ave. shopping stops like Macy's, Saks, and Bloomingdale's, and much, much more. There is never a shortage of things to see and do in The Big Apple!

For more information on what's happining in New York in October, contact the New York Convention & Visitor's Bureau, 2 Columbus Circle, New York, NY 10019, (212) 397-8200.

CHAIRMAN'S CORNER

CONVENTION TIME: READY OR NOT

Summer vacations were ten years long when I was a child. But for many years now, the Fourth of July seems to be followed directly by Labor Day. And so it goes that this is the "Pre-Convention" issue of *MN*. The Convention will be in New York City the first week in October. All the details can be found in this issue.

This will be our last Convention in New York City for many years to come, so we expect a large turnout. We recommend that you register and make reservations as soon as possible.

The Convention continues to be the one activity that most members associate with NPTA. For some members, this is the only activity that they participate in, but the percentage of that group has been diminishing every year. Each year more and more members attend the many seminars, training sessions, and university-based programs that have been developed by the Association. NPTA sales of various industry publications continue to grow and once their value is understood we find a ready group of customers for new publications.

The quality of this magazine continues to improve and the officers, directors and staff receive compliments and encouragment wherever we travel. Many members have increased the number of their subscriptions so that each key person is sure to have his or her own copy.

Publication of Denis Healy's book, *Growth Strategies for Paper Distribution*, this year will be the first PAPER Foundation project to be completed. Others will follow, and the fund raising for the Endowed Chair will accelerate. Both the Foundation and the Endowed Chair show the promise of making NPTA membership more valuable to each of us in the years to come.

The Chairman's Luncheon, on Monday, October 7, will have Henry Kissinger as our speaker and the Stanley O. Styles Award will be presented. Do plan to attend. A portion of the price of each ticket will go to the PAPER Foundation fund.

We look forward to seeing you in New York at the Convention, and we politely suggest you owe it to yourself and your company to explore what else NPTA has to offer you, in addition to the Convention itself.

Frank J. Viegas

Frank J. Viegas, NPTA Chairman

Printing Paper

U.S. BECOMES NET BOOK IMPORTER

In 1983, for the first time since World War II, the U.S. became a net importer of books, reported the Commerce Department. In addition to being a net importer in terms of units of books, the U.S. also remains a net exporter in terms of dollars. The total export dollar value in 1984 was $642.8 million while the import figure was $495 million.

The 1984 import and export trend has shown a significant rise in imports of books of 36% over 1983 while exports rose only 3%. 1983 was also a bad year for U.S. exports as they dropped 18% compared to 1982. Leading in the export of books to the United States were Singapore with a 176% increase and Hong Kong with a 117% increase. In terms of dollar volume, imports represent 16% of total U.S. book consumption.

The increase in book imports is significant because it is one of the few classifications in printing where there is the ability to import through the Manufacturing Clause. Most of the book imports have been "coffee table" books, children's books and other items that are exempt from the Manufacturing Clause.

NEW POLICY PERMITS REPRODUCTION OF CURRENCY

The Treasury Department has announced a new enforcement policy permitting the use of currency reproductions in commercial advertisements as long as they adhere to size and color restrictions, reported the Government Affairs Department of Printing Industries of America, Inc. (PIA).

"The new policy will eliminate uncertainty for printers who have, in the past, been asked to use reproductions of currency in their clients' advertising materials. This conflicted with the previous Federal law provision that technically prohibits currency reproductions," noted Ben Cooper, senior vice president of PIA Government Affairs.

Under the new provision, printers will be allowed to use photographic or other forms of U.S. and foreign currencies for reproduction if they follow certain size and color limitations. The items must be produced only in black and white and be less than three-quarters or greater than one and one-half times the size, in linear dimension, of each part of the original item.

In addition, *negatives and plates used in the reproduction process must be destroyed after their use.*

The Treasury Department expects to increase enforcement efforts against color currency reproductions and against black and white reproductions that do not meet size restrictions.

This new policy is consistent with the Supreme Court's decision in the case "Regan vs. Time, Inc." in the July, 1984 ruling that illustrations of currency are allowed for "philatelic, numismatic, educational, historical or newsworthy purposes" as long as they follow the color and size restrictions.

NEW MAGAZINE AVAILABLE FREE

The first issue of *Magazine Design & Production*, published in May, is targeted at all of those involved in the magazine business. The 70 page first issue is a slick-looking publication that contains a number of interesting feature articles and departments.

With the advent of new technology, magazine production and design are being brought close together. The line separating these two functions is blurring as technicians use computers to electronically paste-up magazine pages.

The lead article of the May issue is titled "Where's The Paper" by William Eisner. With mounting concerns about coated paper supply in late 1984 and early 1985, the magazine production community has been particularly upset. Especially because the number of magazine titles that have been added in the last year has put a greater burden on the already over-stressed supply of coated stock.

Paper people interested in receiving a free subscription to *Magazine Production & Design* should write to the magazine at P.O. Box 817, Mineola, NY 11501.

FLEXO EQUAL TO OTHER PROCESSES SAYS FTA

According to George J. Parisi, executive director of the Flexographic Technical Association, "flexographic printing quality is now the equal of letterpress and gravure." So much so that the FTA had to take back an award that was given to a four-color entry in its competition printed on combined corrugated by letterpress not true flexography, as indicated on the entry form.

"This is not an unusual error for the judges to make, particularly since the replacement of lithographic printing by flexography in the corrugated industry is so widespread," Parisi explained. "And the quality of the flexographic printing process is equal to that of the traditional letterpress process used in the corrugated boxmaking industry."

ELECTRONIC PRINTING: A FAST-GROWING MARKET

It started with bar coding, but it did not end there. The ability to print quickly, especially on pressure sensitive label products, seems to have unlimited possibilities.

Bar coding itself is estimated to be a $150-200 million industry reports *Form* magazine, the publication of the National Business Forms Association. Bar coding is now prevading most industries, but the label concept has now been taken one step further—into signage.

In-store signs, quickly printed electronically, are possible because of the marriage of the personal computer and a special printer. Where will electronic printing end?

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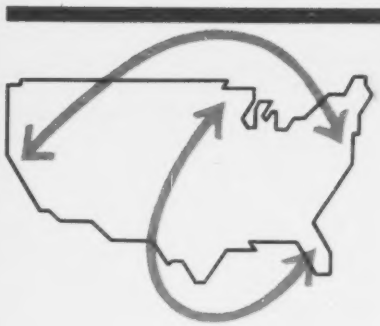

Professions Unlimited is a 13 year old recruiting firm specializing in the paper distribution industry with emphasis on flexible packaging, fine paper and industrial supplies. Professions has placed over 100 people in these areas since 1981—from New York to California, Minnesota to Florida. 80% of those placed were experienced in the paper merchant trade, the remainder were from manufacturers serving paper merchants.

To find out how you or your firm can benefit from our services contact Carl Coco, Jr., CPC, Executive Vice President or Philip R. Gross, CPC, Vice President National Accounts.

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*Please note: Our policy states that we only work with one merchant house per city.

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INDUSTRIAL PAPER

GOVERNMENT REPORTS ON SANITARY PAPER PRODUCTS

According to a new report in the "U.S. Industrial Outlook 1985," published by the U.S. Department of Commerce, the value of sanitary paper products shipments (in constant 1972 dollars) increased approximately 6.5% in 1984, compared to 8% in 1983. The driving forces behind the industry's excellent sales performance in 1983-84 and in earlier years, severe economic downturns notwithstanding, were found in three major categories: bathroom/toilet tissue, disposable baby diapers and feminine hygiene products.

Although there has been a constant shift in consumer preferences and purchasing trends within these major product groups—single-ply versus multi-ply, generic versus private label brands, tampons versus sanitary pads, etc.—the nondiscretionary nature of the products has provided the industry with a secure and relatively stable base. Around this base, the industry has been able to develop—at great cost in research and advertising—and expand its entire sanitary paper products line.

Toilet tissue, disposable diapers and feminine hygiene products account for about two-thirds of the total annual value of the industry's product shipments. While most other paper industry sectors experienced a decline in shipments during the 1982 recession year, bathroom tissue sales climbed 2%, disposable diapers rose 7% and feminine hygiene products increased 2.6%.

The largest fluctuations in sanitary paper products shipments over the past few years have occured in products of a more discretionary nature (household toweling, napkins, facial tissue). In addition, products geared specifically to industry (industrial bathroom tissue and wipes) use also have seen these fluctuations.

Fluctuations in disposable baby diaper sales (16.2 billion units were shipped in 1984) have occured because of demographic changes, significant technological improvements, cost-competitiveness versus reusable diapers and greater expenditures on disposable products when consumer spending power increased.

The feminine products market in 1984 totaled an estimated 13.1 billion units (8.6 billion sanitary pads and 4.5 billion tampons), has undergone a dramatic shift over the past few years. This is a direct result of concern about the often-fatal toxic shock syndrome and its documented connection with high-absorbency tampons. It was estimated that sanitary pads accounted for two-thirds of the total value of feminine hygiene sales in 1984 and tampons made up the remainder. This was a reversal of the situation in the late 1970's when tampons held about 60% of the market.

It has long been claimed that bathroom tissue shipments have attained market saturation levels. These shipments traditionally do not show any dramatic gains or losses and generally climb very slowly, closely correlating to U.S. population growth. But in 1983 it was estimated that domestic production of bathroom tissue increased 11% over 1982.

Although supporting data are incomplete, it is estimated that the extraordinary jump in shipments was due partly to a substantial increase in sales to industry, additional capacity coming on stream, inventory rebuilding and unusually stiff price competition. It is estimated that 1984 shipments were closer to the longer-term real growth level of 2 to 3%.

In 1984, an estimated 1.8 million tons of toilet tissue—about eight million rolls—were shipped. Approximately 60% of the total consisted of single-ply tissue that has gained in popularity over multi-ply in recent years. This is a reversal of the trend of the early 1970's. The change is attributed to lower unit costs and technological improvements that have increased the strength, softness and absorbency of single-ply tissue.

There has also been a gradual shift to private label brands that has been encouraged by lower unit costs and steady improvements in the appearance and quality of that product line. Private label and generic tissue products are manufactured by many of the industry's leading producers in addition to their traditional brand name lines.

Exports of sanitary paper products that peaked in 1981, totaled approximately 78,000 tons, a value of $138 million in 1984. Exports, accounting for 1% of total U.S. sanitary paper products shipments in 1984, were sent primarily to Canada, Mexico, the Caribbean Basin and Western Europe. Major exported products included paper towels and, presumably, disposable diapers and other sanitary health products (although they are not specifically identified in U.S. export schedules).

The real value of shipments of sanitary paper products is forecast to climb 7% in 1985. Spurring the growth will be sales of disposable diapers, feminine hygiene products and discretionary products, such as toweling, napkins and facial tissue. Product innovation may include the introduction of specially-treated facial tissue that kills cold and flu viruses on contact. The 1985 projection is dependent on continuing national economic growth that would encourage consumer spending for discretionary-type products.

Over the 1985-89 period, sanitary products shipments are forecast to rise by an annual compound rate of 6.5%. The markets for disposable diapers (baby and geriatric) and feminine hygiene products will continue to show the largest growth. Tampons, especially lower absorbency varieties, will regain much of their lost market and sanitary pads will barely maintain their leading share of the market.

Exports, especially to newly emergent markets in Latin America and Asia, will continue to climb. The real volume of exports is expected to increase by about 5% annually during 1985-89, but will still account for only 1 to 2% of total U.S. sanitary product shipments.

Further information on this report may be obtained by contacting the U.S. Department of Commerce, Office of Forest Products and Domestic Construction, (202) 377-0376.

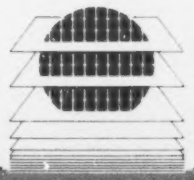
EMPLOYMENT-AT-WILL?

From a recent issue of the newsletter of the Graphic Arts Association of Pennsylvania, New Jersey, and Delaware comes the following. The employment-at-will doctrine is dying a slow death. Employers should know that statements appearing in the employee handbooks or manuals, designed to promote harmonious employee relations, can haunt them. While such handbooks often are useful, they should contain no:

- *representations as to specific durational terms of employment;*
- *promises of specific treatment in specific situations; or,*
- *references or connections to other documents which may be deemed to be employment contracts.*

On the other hand, it would be advisable to state that the handbook:

- *does not constitute a contract of employment; and,*
- *can be modified or discontinued at any time at the sole discretion of the employer.*



SCHEDULE OF EVENTS SUMMARY

1 • 9 • 8 • 5

Date/Time	Event
SATURDAY, OCTOBER 5	
8:00 a.m. - 5:00 p.m.	Registration
10:00 a.m. - 5:00 p.m.	Exposition
10:00 a.m. - 12:30 p.m.	Winning With People
12:30 p.m. - 1:30 p.m.	Young Executives Luncheon
12:30 p.m. - 4:00 p.m.	Spouses Program
1:30 p.m. - 2:30 p.m.	YEF Members Meeting
3:00 p.m. - 4:30 p.m.	Customer Base Expansion: Improving Your Competitive Edge
SUNDAY, OCTOBER 6	
9:00 a.m. - 4:00 p.m.	Registration
10:00 a.m. - 11:30 a.m.	General Business Session
11:00 a.m. - 4:00 p.m.	Exposition
11:30 a.m. - 12:00 Noon	NPTA Annual Business Meeting
12:00 Noon - 5:00 p.m.	Spouses Program
MONDAY, OCTOBER 7	
8:00 a.m. - 12:00 Noon	Registration
8:30 a.m. - 9:30 a.m.	Continental Breakfast
8:30 a.m. - 12:30 p.m.	Exposition
9:30 a.m. - 12:00 Noon	Spouses Program
10:30 a.m. - 12:00 Noon	Implementing Successful Printing Paper Marketing Programs
12:00 Noon - 12:30 p.m.	"Preparing for the Future" Reception
12:30 p.m. - 2:30 p.m.	Chairman's Luncheon
2:30 p.m. - 4:00 p.m.	Paper Merchant Retail Cash & Carry - A to Z
TUESDAY, OCTOBER 8	
9:00 a.m. - 11:00 a.m.	Establishing the Highest Value For Your Company
9:00 a.m. - 11:00 a.m.	Managing Customer and Product Line Profitability
9:00 a.m. - 11:00 a.m.	Management Roundtable

Convention Registration

In the New York Hilton

Saturday, October 5: 8:00 a.m. - 5:00 p.m.
Sunday, October 6: 9:00 a.m. - 4:00 p.m.
Monday, October 7: 8:00 a.m. - 12:00 Noon

NPTA HOLDS THIRD ANNUAL WEEK FOR

When 60 people come together to participate in a variety of meetings, it hardly makes news. But when those people are the leaders of an industry, it is worth finding out what they are talking about.

Paper distribution executives, volunteer leaders of the National Paper Trade Association, arrived in Boston for the Association's third Annual Committee Week in April. It was clear that they had business on their minds—the business of improving the industry in which they all work. These leaders each spent two days or more intensely studying the paper distribution industry from a number of different perspectives: education, statistical analysis, policies, the needs of printing paper merchants and industrial distribution.

The Association's standing committees are vehicles for that study of the paper distribution industry. These special groups are: the Printing Paper Division Committee, Industrial Paper Division Committee, Education and Training Committee, Management Information Committee, Long Range Planning Committee and the Association's Board of Directors. Each has its own mandate; each contributes to the improvement of the industry.

BOARD OF DIRECTORS

The Board of Directors met to set the Association's goals for the year ahead. Led by chairman of the board Frank Viegas, the Board reviewed the Association's activities and financial status. A broad range of projects were discussed by the 17 member Board.

Highlighted at this year's meeting was the progress of the PAPER Foundation toward reaching its $1 million goal to endow a research chair at the University of North Florida in Jacksonville. $800,000 has been raised to date. The Board also discussed the Stanley O. Styles Industry Excellence Award and its presentation at the annual Chairman's Luncheon. As a Foundation fundraiser, this event will attract industry representatives attending the NPTA Annual Convention and Exposition. The Board wishes this event to be the main annual fundraiser for the PAPER Foundation and hence is putting quite a bit of time and effort into it.

The Board also reviewed nominees for the Stanley O. Styles award and made a decision to announce the winner this year prior to the Convention, probably in August.

The NPTA Board of Directors reviewed all of the Association's activities including the further development of *Management News* magazine. The Board approved its expansion to 28-32 pages per month.

PRINTING PAPER

The Division's Committee for Printing Papers had a very productive meeting in Boston. The group determined that its "Quality Report" developed to help merchants and printers deal more successfully with problems encountered in printed pieces should be coordinated with the Canadian Paper Trade Association. The CPTA has had great success with their form and its adoption by both mills and merchants. By combining forces, a "North American" form might be developed that could be used by all.

The Committee also revised the Printech Week curriculum to make it less technical, planned a presentation for the 1985 Convention and updated the popular brochure "What Does The Right Paper For Your Job Really Cost?"

The group went further in the area of education by recommending the development of a series of educational training modules for printing paper sales people and a customer education program. The one and one-half day meeting was fruitful and the contribution to the Association's work by all participants was significant.

INDUSTRIAL PAPER

The Industrial Paper Division Committee has a responsibility to represent member firms that sell industrial paper and allied products. The work of the Committee has been to develop projects and programs that provide information tailored to the needs of this group.

At its April meeting, the Committee approved a comprehensive study of industrial and dual firms in the area of compensation. The results of this investigation are expected in the Fall.

Also of note is the Committee's development of "commodity specific programs." The first of these, an "Industrial Packaging Seminar," has been slated for October 30-31 in Chicago, IL.

This year's Convention sessions for industrial merchants have been selected by the Committee: "Customer Base Expansion: Improving Your Competitive Edge."

One of the mainstays of the Committee's work is in the area of supplier relations. They have found ways to let industry suppliers know that merchants want to work more closely with them. These methods now include the creation of an exhibitor and suite holder council to review the convention and hotel arrangements.

EDUCATION AND TRAINING

The thrust of the Education and Training Committee's growth during the past three years has been the expansion and further development of its entire educational schedule. The components of the schedule include: seminars, conferences, university-based programs, audio visuals and sales training.

The Education and Training Committee has directed that seminars be expanded in both number of offerings and topics. The programs are now offered a minimum of three times a year in different locations and they cover a broad range of topics to meet the needs of everyone—from the CEO to the operations person.

The Committee has developed several new conferences for this section of its schedule, including "Computerization" and "Sales Development" conferences.

The University-based programs have seen a steady growth in the number of participants over the past three years. For example, in 1982-83, the programs had 86 merchants registered while the following year, 1983-84, had 321. Most recently, in 1984-85, the number increased to 636 participants.

Two new, in-depth sales training programs have been added to this portion of the Education and Training schedule. They include the Xerox Learning Systems Professional Selling Skills and the Carew Positional Selling programs. The Carew program is geared specifically towards the

COMMITTEES

experienced sales person, focusing on sales skills methodology and human resources.

The growth of the Committee's audio visual component includes the development of flyers advertising video training programs according to separate areas of interest. A second segment of this growth also incorporates one of the Committee's new projects—the production of an in-house video training program. "The Role of the Paper Merchant" documents and disects the major functions of the wholesale paper distributor including receivables, payables, inventory, as well as their economic role. The purpose of this video is to give a well-rounded picture of a distributorship operation.

One of the goals of the Education and Training Committee is to produce "spin-offs" of this video that would be specific programs focusing on one particular aspect of training. In addition, the Committee will try to standardize the industry around the ½" video VHS format as another of its goals.

A second new project that the Committee has developed is the "Working Lunches." These consist of a meeting of 5-6 merchants who discuss one specific area of training and exchange their individual ideas. They then combine these ideas to develop an "ideal" training program.

MANAGEMENT INFORMATION COMMITTEE

The basic mission of the Management Information Committee is to continuously monitor the Association's research and statistical program. It ensures that the member firms receive valid, practical and reliable financial information about the industry. This is accomplished through the use of various reports and services to help paper merchants operate more productively.

Existing reports, publications and programs are refined and new ones are continually developed. These include the yearly Performance Analysis Report (PAR), yearly Paper Merchant Performance book, monthly Paper Merchant Sales Report, and a new Quarterly Business Conditions Report.

The PAR program will be improved in several ways during fiscal 1986. Two new, smaller reporting regions have been created, a new "Short PAR" questionnaire is now available, more product line profitability financial measures were added, and several sections of the regular PAR questionnaire were simplified.

The Industrial Paper Division Committee discusses the changing paper distribution scene at Committee Week 1985 held in Boston, MA.

Related to PAR, the yearly summary report (Paper Merchant Performance) will include more graphics and more in-depth analyses this year. Also related to PAR, a new seminar entitled "Managing Customer & Product Line Profitability" will be offered, three sessions in the East, Midwest and West Coast of the country.

Production of the "Paper Merchant Sales Report" will be brought in-house during 1985, once the NPTA's installation of new computer software programs is complete. This will provide greater capability to track participants' historical data, derive estimates, and increase reliability and accuracy, while maintaining confidentiality. Several regions will also be restructured, as with PAR. Greater emphasis will be placed on recruitment of participants.

A major project to be handled by the MIC Committee will be a comprehensive update and revision of an NPTA guide first published in 1969, the *Paper Merchant Guide To Profitable Management*. Committee members will provide substantial input in critically reviewing/updating pertinent sections, coordinating efforts with NPTA's financial consulting firm—Management Foresight, Inc., and the Research Director. Funds have been budgeted for consulting, writing, and editorial counsel.

The "FactBook" is currently contained in NPTA's "Who's Who" membership roster. It is a collection of industry statistics from the U.S. Census Bureau and the PAR survey. The 1985 plan approved by the Association's Board of Directors calls for a significant expansion of the FactBook, using new census data, just published, plus other sources. The book will be enhanced via the use of more textual analyses, graphics, and made into a separate publication. Several marketing alternatives will be explored.

LONG RANGE PLANNING

The Long Range Planning Committee met to refocus its objectives and redefine its purpose. When first established three years ago, the Committee had the responsibility of developing the Association's long range plan. The planning process is still alive and well and so the Committee is still a vital part of the NPTA structure.

The group's new role is now to spend half of its time monitoring the other Committees' planning activities and half of its time looking ahead. This general planning function assists the Board of Directors in determining the direction NPTA will take as an organization. This is an important part of the Association's work and the Long Range Planning Committee will continue to be an integral part of that work.

In terms of the day-to-day affairs conducted by other NPTA Committees, the Long Range Planning Committee has developed an easier tracking system for them to use in their planning of future activities. This standardization allows each Committee to present a five year plan containing the most details for the first three years. Forms containing this information are filled out by each Committee chairperson and forwarded to the Long Range Planning Committee. The Committee, in turn, synthesizes these plans and analyzes the results before submission to the Board of Directors.

INDUSTRIAL PAPER MARKETS-HOW BIG?

The U.S. Bureau of the Census, in its 1982 Census of Wholesale Trade, reported that merchant wholesalers sold $9.1 billion worth of industrial and personal service paper. However, most merchants specialize in a few key market segments to make up this figure. These include: sanitary papers, food service disposables, janitorial supplies/chemicals, retail packaging, etc.

Three of the above-mentioned industrial paper markets account for a significant share of the industrial and dual merchants' total sales each year. Based on annual NPTA PAR (Performance Analysis Report) survey results, Table 1 shows a three-year trend of these three markets:

As one can see from Table 1, together these three market segments typically account for over 40% of total industrial merchants' sales volume, and 35% of dual merchants' sales. And, these segments have represented an increasing percentage of their total sales.

Following is a more in-depth look at these important market segments.

Food Service Disposables Market

The Single Service Institute in Washington, D.C. has estimated that the total U.S. market (at retail level) for food service disposables is currently worth about $2.75 billion.

Paper cups, plates and bowls constitute a $1.2 billion commercial and institutional market, and a $600 million consumer market. Paper tubs, lids, yogurt containers and miscellaneous items are estimated to represent another $1 billion in volume.

Table 1

INDUSTRIAL PAPER END-USER MARKETS

Percent of Total Sales Accounted For By:	Industrial Merchants 1981	1982	1983	Dual Merchants 1981	1982	1983
	(Weighted Means)					
Food Service Disposables	11.25	13.13	15.12	9.21	10.62	10.49
Janitorial Supplies	7.40	7.86	8.20	4.69	4.31	5.31
Sanitary Papers	17.02	18.74	18.40	18.61	20.87	19.62
Total:	35.67	39.73	41.72	32.51	35.80	35.42

Source: National Paper Trade Association, inc. 1984

Table 2

SANITARY PAPERS
Percentage of Market By End User

Distributor Markets	Facial Tissue	Bathroom Tissue	Paper Towels	Paper Napkins
1. Health Care (Hospitals, Nursing Homes, Clinics)	28.6%	15.9%	18.2%	18.3%
2. Industrial	17.4	27.8	27.5	7.3
3. Hotel/Motel	16.4	7.6	4.3	9.2
4. Office/Retail Businesses	11.8	18.7	16.8	7.3
5. Schools & Universities	11.1	13.3	14.6	19.3
6. Food Service	2.4	6.0	4.5	22.6

Source: National Paper Trade Association, inc. 1977

The Janitorial Supplies Market

Janitorial supplies are estimated by the ISSA (International Sanitary Supply Association in Chicago) to be worth $6.6 billion (distributor purchase cost). Included in this market segment are: cleaning chemicals and equipment, paper hand towels, and toilet tissue. Hand towels account for about 16% of the total (or $1.06 billion). Toilet tissues account for about 5% (or $330 million).

Looking at the 1982 Census of Wholesale Trade again, "janitorial equipment, supplies, chemicals and allied products" together accounted for 3.3% of all industrial paper wholesalers' sales in 1982. This is up from 2.7% in 1977. NPTA members, then, are more heavily involved in this market than the average industrial paper wholesaler, since the NPTA industrial member houses had 7.86% of total sales in janitorial supplies in 1982, and 4.31% for dual houses.

The Sanitary Papers Market

No hard data exists for the exact size of this market but NPTA member industrial and dual merchants had about 18-20% of their total sales of this line during 1983. Based on 1983 PAR results, industrial and dual members participating in the survey generated $3.36 billion in sales. If 20% of this $3.36 billion is sanitary papers, this represents $673 million in sales. Nationwide, accounting for those additional merchants who are *not* NPTA members, the figure is probably closer to $910 million.

Back in 1977 the NPTA conducted a survey with Technomic Consultants, regarding end-users of sanitary tissue products. In Table 2, the wholesalers estimated which markets the four major sanitary tissue products went into. It is obvious that the health care and industrial markets are the most significant.

Note: A new seminar exploring the measurement of customer and product line profitability will be sponsored by NPTA. Dr. Peter Mullins of Management Foresight, Inc. is the speaker. First session: July 25, New York City.

GOV'T. NOW PAYS FASTER

In 1978, the General Accounting Office (GAO), Congress' investigative arm, issued a startling report showing that federal government agencies paid their bills late nearly 40% of the time! How much did this cost businesses selling goods and services to the federal government? GAO estimated the cost to vendors at $150-$375 million per year.

This horrible record had a particularly harsh impact on small businesses, including wholesaler-distributors, who were, in effect, lending money interest-free to the federal government. The answer for many was to refrain from doing business with the federal government.

Because the federal government would, but for its extremely poor credit record, have presented wholesaler-distributors with an excellent potential source of business, NAW joined with its allies in the Slow Pay Coalition to work for passage of the federal Prompt Payment Act requiring federal agencies to pay their vendors on time or face interest penalties on overdue amounts. The Act (PL 97-177) was passed into law in 1982 and went into effect on October 1 of that year.

The impact of the Prompt Payment Act has been astounding during the two fiscal years (FY 1983 and FY 1984) of its existence. The Prompt Payment Act works, and the record clearly proves it.

According to the Office of Management and Budget (OMB), federal agencies paid 99% of their bills on time in both years—clearly a dramatic improvement.

In both fiscal years, the Department of Defense was responsible for the bulk of interest penalties paid by all federal agencies—71% in Fy '83 and 62% in FY '84.

In short, while the problems of the not-too-distant past have not been totally eliminated, the dramatic improvement in the payment practices of federal agencies has brought us close to that point, indeed, and that is an important step toward making the federal government a reliable customer and an excellent potential source of future business for wholesaler-distributors.

The National Paper Trade Association is interested in hearing about paper merchants' experiences with the Federal Government relevant to this subject. If you have had an experience that you would like to share, please contact NPTA, 111 Great Neck Rd., Great Neck, NY 11021. (516) 829-3070.

LEGISLATURES ENACT NEW CLEAN-UP BILLS

Government regulatory activities have been in full swing lately with the introduction of new environmental clean-up bills by state legislatures, the Single Service Institute reported recently.

One of the first of the new bills is in Pennsylvania with a proposed tax on "food service containers," drafted by Representative Benjamin H. Wilson (R-PA). The legislation would impose a 1/20th cent tax on cups, bowls, plates, buckets, boxes and paper and foil food wrappings used in restaurants for the packaging of food for human consumption. Revenues from the tax would support a proposed Pennsylvania Beautification Fund used to finance local beverage container recycling and litter control programs.

In New Jersey, a bill requiring the recycling of reusable waste materials has been introduced. This legislation applied to any plastic container having the capacity of 12 or more ounces and containing a food or non-food product. If adopted, this bill would call for the recycling of 15% of the municiple solid waste stream by the end of the first year and 25% by the end of the plan's second year.

A tax on plastic containers, including foam products, has been proposed in Oregon. This bill would support the waste disposal program. "Container" is described as a returnable or non-returnable articles in which tangible personal property is placed.

EVENTS

JUNE

11. *Marketing Value Added Services, Indianapolis, IN. Contact NPTA.*

25. *Telemarketing - The Key To Maximizing Your Sales Efforts, Philadelphia, PA. Contact NPTA.*

26. *Telemarketing - The Key To Maximizing Your Sales Efforts, Boston, MA. Contact NPTA.*

27. *Telemarketing - The Key To Maximizing Your Sales Efforts, New York, NY. Contact NPTA.*

JULY

9-10. *Successful Inventory Management For The Wholesale Paper Distributor, Washington, DC. Contact NPTA.*

25. *Managing Customer and Product Line Profitability, New York, NY. Contact NPTA.*

AUGUST

6. *Telemarketing - The Key To Maximizing Your Sales Efforts, Montreal, Canada. Contact NPTA.*

7. *Telemarketing - The Key To Maximizing Your Sales Efforts, Buffalo, NY. Contact NPTA.*

8. *Telemarketing - The Key To Maximizing Your Sales Efforts, Baltimore, MD. Contact NPTA.*

26-28. *The Keys To Growth As A Sales Manager, New York, NY. Contact NPTA.*

YEF LAUNCHES MID-YEAR EVENT

The Young Executives Forum held its first mid-year conference on March 22-24, 1985 at the beautiful Innisbrook Resort in Tarpon Springs, Florida. 30 Young Executives, representing every part of the country, attended this first conference and all agreed it was a great success.

The purpose of this event was to bring young executives together to share mutual concerns and ideas about our paper industry. This year's conference format was structured to allow a mixture of formal classroom learning with time for informal relaxation and networking among members.

Coordinating the education seminar was Dr. Thomas W. Speh, PhD., professor of marketing at Miami University of Ohio. Dr. Speh's presentation, "Planning for Growth in the Paper Merchant Industry," was the first day topic of the conference.

Dr. Speh led a discussion on how young executives can build a grid matrix chart to plot their company's current market segments. The grid rates current relative market share against market growth rate for each segment. Once charted, a company can then see where each market segment of their business rates in relation to the others. Categorizing these further into for broad categories, Dr. Speh laid out a plan to improve the segments that strengthen the overall company and align it for growth.

The second and third day education sections were conducted by John McNeill, assistant professor of management, Miami University of Ohio. Mr. McNeill expanded on Dr. Speh's presentation by integrating the "Cultural Heritage" aspect of successful business management. Small groups helped the young executives evaluate situations from a value standpoint. The purpose was to show that companies carry cultural values that are responsible for their success.

All education programs were critiqued by the participants and received excellent ratings. Most of those attending felt that the program had definite relevance and could be applied back home at their companies.

The best part of meeting with others in similar businesses is the sharing of ideas and thoughts. All of us who are involved in managing our businesses need input on successful plans that work. This "networking" not only informs us of new ideas, but also helps to solidify or reinforce our current goals and plans. Young Executives have a desire to be true professionals in management. Sharing problems, listening to the concerns of others, offering solutions, or seeking a peer's counsel are important parts of the Mid-Year conference's purpose.

Jon Bloom (l.), executive vice president of JB Papers, and past chairman of YEF, receives a plaque from new chairman Mike Olthoff, vice president Nichols Paper & Supply Company, at the conference.

Conference attendees enjoyed their weekend retreat.

Away from the formal education segment of this year's meeting at Innisbrook, most young executives participated in some form of recreation (but none were eager to have their performances recorded). Innisbrook is known for its excellent golf and tennis facilities as well as being a great place to warm in the sun. And perhaps the Florida sun was the most enjoyable recreational aspect of this year's conference. Next on the list would be the great food at Innisbrook. Both Friday and Saturday nights, dinner was served outdoors, barbeque-style, and was delicious.

The objective of the program was to allow a mixture of education, recreation, and networking. All of those attending felt that this first Mid-Year conference was a great success and met those objectives. Planning is already underway for next year's conference, and I would strongly encourage all young executives to consider attending this successful event.

Listed below are those who attended this year's conference:

By: Steve Ohrman, General Manager, Supplyways Inc., Portland OR

Young Executives Mid-Year Conference

Attendees

Linda Hartinger
Anchor Paper Co.
St. Paul, MN

Mark Kraus
Ambrose Inc.
Birmingham, MI

Jerry Maltz
Century Papers
Houston, TX

Franz J. Harris
Cordage Papers
Columbus, OH

Dennis Weaver
Cordage Papers
Cleveland, OH

Eric Mohr
Dacotah Paper Co.
Fargo, ND

Peter Tomasini
The Dowd Co., Inc.
Woburn, MA

William Hirsch
Fulton Paper Co.
Atlanta, GA

Jeff Kirchmer
General Paper Company
Pittsburgh, PA

Jeff Tapping
Graphic Papers
Scarborough, Ontario
Canada

Andrew Lick
Harrisburgh Paper
Harrisburgh, PA

Jonathan Bloom
J.B. Papers
Union, NJ

Dave Milleman
Mac Papers Inc.
Tampa, FL

WHAT THEY SAID...

"...the first annual Mid-Year Conference was a tremendous success. The three presentations were informative and should prove to be beneficial in meeting challenges in our changing market."

Franz Harris, General Manager
Cincinnati Cordage and Paper Co., Columbus, OH

"...the Conference was excellent. Dr. Speh's matrix was definitely a useful tool and Professor McNeill's presentation was a super concept to remind the merchant about the importance of maintaining an appropriate atmosphere and overall image of the company. Getting together socially gave me a better understanding and appreciation of the industrial merchants—it's a tough business!"

Dan Hock, Sales Manager,
Seamon-Patrick Paper Co., Detroit, MI

"...the YEF Mid-Year Conference was a refreshing experience and far surpassed my expectations. John McNeill's presentation was particularly thought-provoking. Also, meeting my peers and discussing common issues and problems was definitely a valuable benefit of the conference."

Mike Keneally, Vice President
Set Point, Foxboro, MA

"...the programs were personally very informative and educationally rewarding. The informal sessions were a great opportunity to meet my contemporaries from the United States and Canada and to discuss different viewpoints and concerns. Thank you again for all your work, I look forward to next year's conference."

Steven W. Carrier, Corporate Vice President
Queensboro Paper Corp., Jamaica, NY

Michael Olthoff
Nichols Paper
Muskegan, MI

Alan Leininger
The Ohio & Michigan Paper Co.
Toledo, OH

Thomas Burnett
Peninsular Paper Co.
Tampa, FL

John W. Dietel
Plymouth Paper Company
Holyoke, MA

Steven Carrier
Queensboro Paper Corp.
Jamaica, NY

Kevin Chapman
Rotary Paper Manifold
Schiller Park, IL

James Stenger
Rob Fogel Mill-Andrews Corp.
Rochester, NY

Vernon Field
Russel-Field Paper Company
Bellwood, IL

Dave LaMothe
Seamon-Patrick Paper
Detroit, MI

Jim Reno
Seamon-Patrick Paper
Detroit, MI

Dan Hock
Seamon-Patrick Paper
Detroit, MI

Michael E. Keneally
Set Point Paper Co., Inc.
Foxboro, MA

Brad Shorr
Shorr Paper Products, Inc.
Aurora, IL

Steve Ohrman
Supplyways
Portland, OR

Alan Striano
Viking-Criterion Paper Corp.
Maspeth, NY

David Sparks
Wilcox Paper Co.
Syracuse, NY

David Rhodes
Zellerbach Paper Company
Portland, OR

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APRIL, 1985

PAPER MERCHANT SALES REPORT

NPTA Regions	Sales Per Selling Day April 1985 - Compared To - April 1984	Sales Per Selling Day April 1985 - Compared To - March 1985	Sales Per Selling Day 1985 Year-to-Date - Compared To - 1984 Year-to-Date	Days Outstanding (Accounts and Notes) At Close of April 1984	1985	Calendar Days' Cost* of Ending March Inventory 1984	1985
INDUSTRIAL							
1	+ 0.5	+ 4.6	- 0.8	43	39	–	65
2	- 1.6	- 3.6	+ 1.2	35	34	51	56
3	+11.2	- 6.6	+ 5.7	36	33	64	55
4	+ 0.2	- 6.9	+ 1.6	37	35	62	49
5	+ 2.1	+ 2.0	+ 3.0	34	33	64	64
6	- 1.9	+ 3.5	- 8.5	38	41	–	–
7	+ 4.5	+ 0.5	+ 2.6	37	34	–	59
NY Metro	+ 3.9	+ 3.8	+10.5	42	36	–	–
Chicago Metro	+ 3.0	- 3.9	- 0.2	35	36	–	47
LA Metro	- 2.9	+ 0.4	- 1.7	50	47	61	51
US	**+ 2.2**	**- 2.3**	**+ 2.8**	**38**	**35**	**60**	**55**
PRINTING							
1	+12.4	- 5.3	+19.1	48	46	–	–
2	+ 3.8	+ 1.7	+ 5.5	44	43	57	58
3	+14.4	- 9.3	+10.4	41	40	80	70
4	+ 2.0	- 1.6	+ 5.5	42	38	69	58
5	- 0.1	- 5.8	+ 6.5	43	42	81	80
6	-12.6	- 9.1	+ 2.2	39	37	–	–
7	+ 1.3	-11.1	+ 9.6	40	36	75	75
NY Metro	- 1.1	- 7.1	+ 0.6	41	37	–	–
Chicago Metro	+ 1.3	- 7.2	+ 4.6	41	40	–	61
LA Metro	- 5.8	- 1.1	- 0.6	44	43	78	87
US	**+ 1.9**	**- 5.1**	**+ 5.9**	**42**	**40**	**73**	**68**

*To calculate monthly inventory turnover, divide 365 calendar days by # of calendar days cost, e.g., 365/73 = 5.00x.

Region 1: CT, ME, MA, NH, RI & VT
Region 2: DE, DC, MD, NJ, NY & PA (excluding NY Metro)
Region 3: AL, FL, GA, NC, SC, TN & VA
Region 4: IL, IN, KY, MI, MO, OH, WV & WI (excluding Chicago Metro)
Region 5: CO, IA, KS, MN, MT, NE, ND, SD, WY
Region 6: AK, AZ, CA, HI, ID, NV, NM, OR, UT & WA (excluding LA Metro)
Region 7: AR, LA, MS, OK & TX
NY Metro: NY: New York City, Long Island and Westchester Co. NJ: Counties of Bergen, Essex, Hudson, Middlesex, Passaic and Union
Chicago Metro: IL: City of Chicago and Cook, DuPage and Lake Cos. IN: Lake Co.
LA Metro: Cities: Los Angeles, and San Diego. Counties: Los Angeles, San Diego, Orange and Ventura (and neighboring parts of Riverside and San Bernadino)

Selling Days
The actual number of days a firm was open for business or that the sales people made customer calls [calendar days less weekends (if applicable) and holidays]. By supplying selling days of each firm, the sales per selling day are standardized according to actual business conditions or company policies.

Days Outstanding
The number of days outstanding on this report are calculated by adding the current month's sales and the previous month's sales and dividing the total by the number of calendar days of the two months. The result is a figure representing average sales per calendar day.

The total figure provided for closing accounts and notes receivable is divided by the average sales per calendar day. The result is the number of days outstanding at the end of the month being prepared.

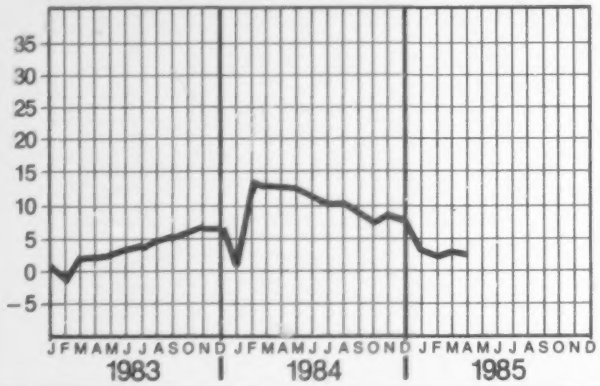
PAPER MERCHANT SALES REPORT

SUMMARY NATIONAL TREND INFORMATION: 1983 TO PRESENT

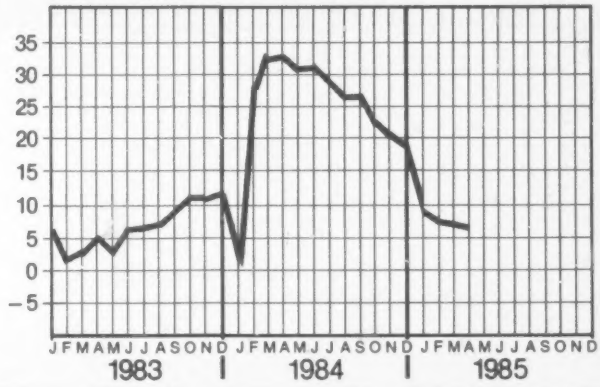
SALES INFORMATION

YEAR-TO-DATE SALES PER SELLING DAY AS A PERCENTAGE OF PREVIOUS YEAR'S YEAR-TO-DATE SALES PER SELLING DAY

INDUSTRIAL PAPER SALES NATIONALLY



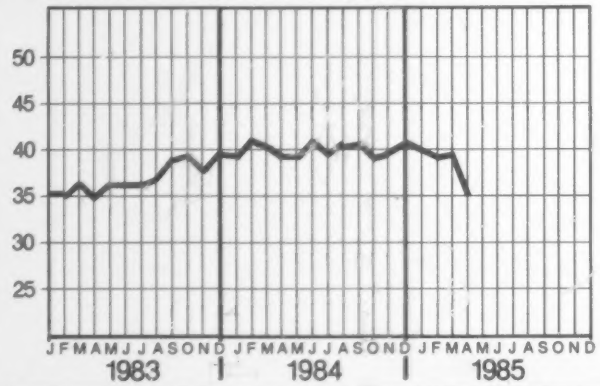
PRINTING PAPER SALES NATIONALLY



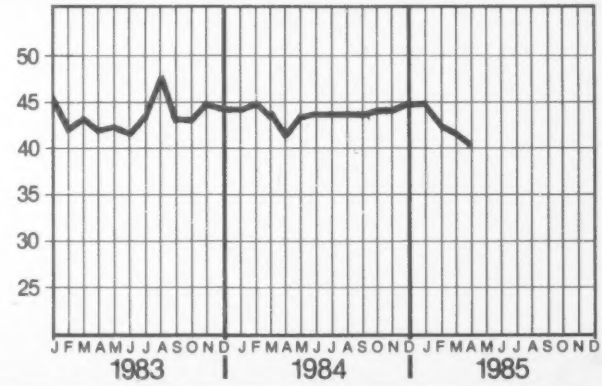
RECEIVABLES INFORMATION

DAYS OUTSTANDING—ACCOUNTS AND NOTES RECEIVABLE FROM PAPER SALES AT END OF EACH MONTH (IN CALENDAR DAYS)

INDUSTRIAL PAPER RECEIVABLES NATIONALLY



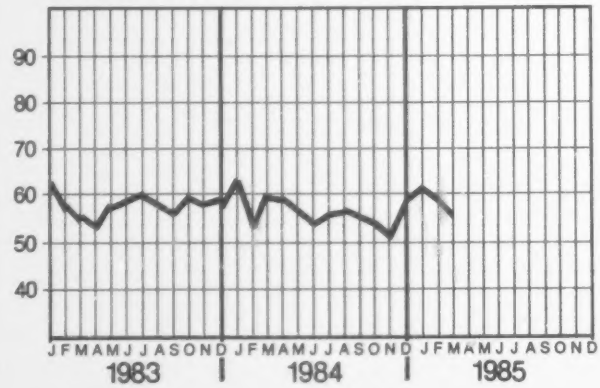
PRINTING PAPER RECEIVABLES NATIONALLY



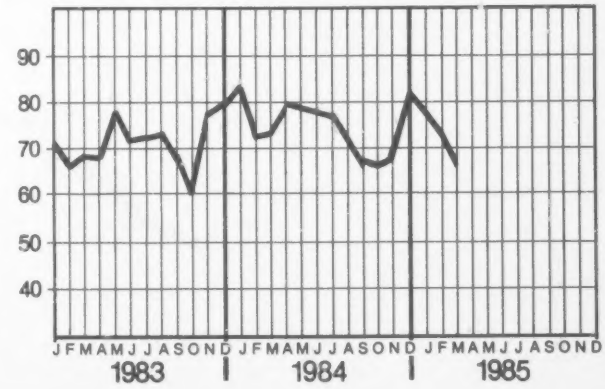
INVENTORY INFORMATION

CALENDAR DAYS COST OF ENDING MONTHLY INVENTORY (FIFO) (IN CALENDAR DAYS)

INDUSTRIAL PAPER INVENTORY NATIONALLY



PRINTING PAPER INVENTORY NATIONALLY



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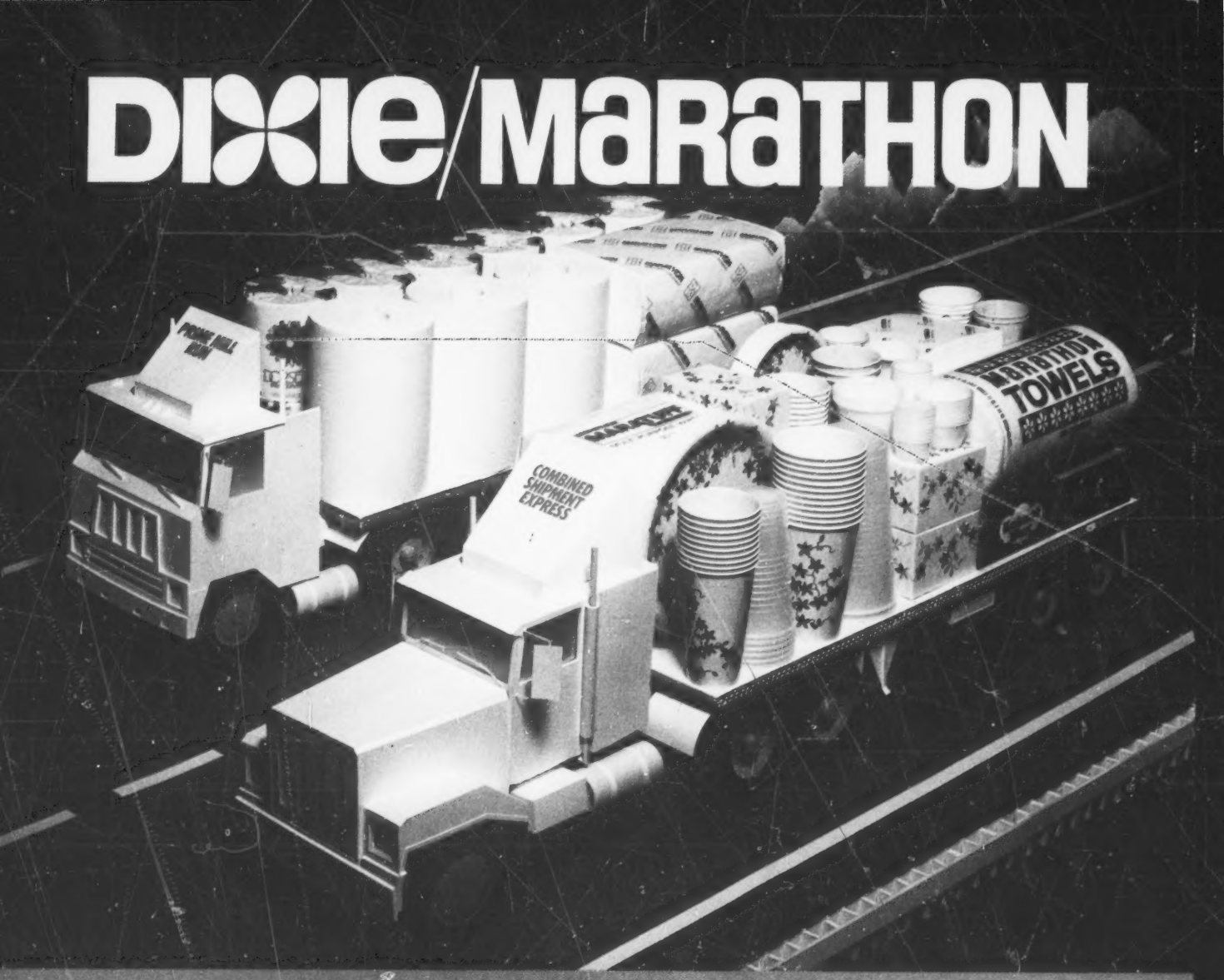

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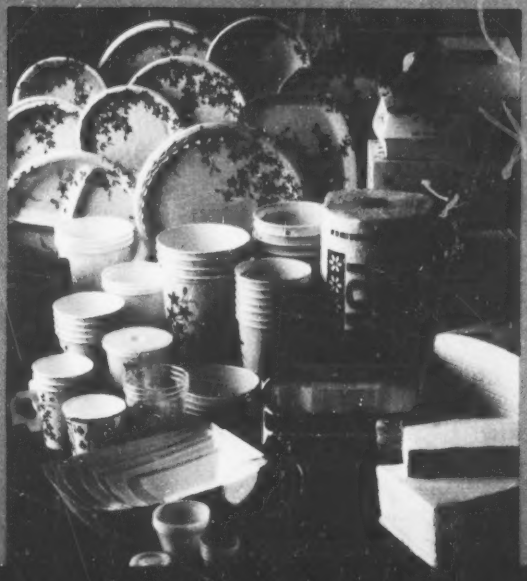

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